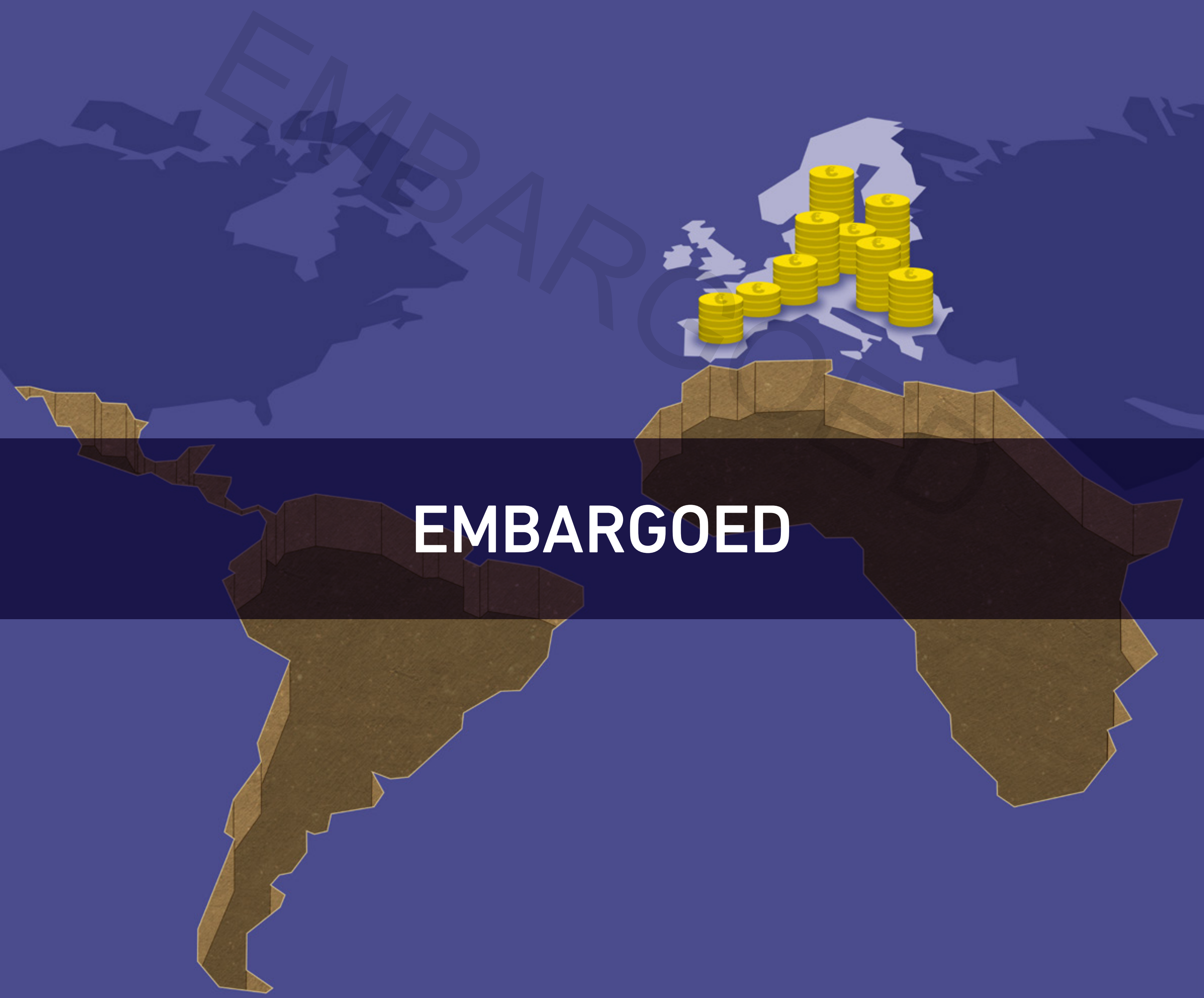
european network on debt and development

Counter Balance Challenging Public Investment Banks

OXFAM

Who profits from the Global Gateway?

The EU's new strategy for development cooperation



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Abbreviations

AFD	Agence Française de Développement
AfDB	African Development Bank
AfIF	Africa Investment Facility
ASEAN	The Association of Southeast Asian Nations
CEPS	Centre for European Policy Studies
CRMA	Critical Raw Materials Act
CSOs	Civil Society Organisations (CSOs)
COFIDES	Compañía Española de Financiación del Desarrollo
DG INTPA	European Commission's Directorate General for International Partnerships
DRC	Democratic Republic of Congo
DFIs	Development Finance Institutions
EBRD	European Bank for Reconstruction and Development
EC	European Commission
ECA	European Court of Auditors
ECAs	Export Credit Agencies
ECFIN	Directorate-General Economic and Financial Affairs
EFSD+	European Fund for Sustainable Development Plus
EIB	European Investment Bank
FTAs	Free Trade Agreements
GAP III	EU's Gender Action Plan III
JETPs	Just Energy Transition Partnerships
KfW	Kreditanstalt für Wiederaufbau Development Bank
ILO	International Labour Organisation
IMF	International Monetary Fund
IPA	Instrument for Pre-Accession Assistance
IP	Intellectual Property
IPPs	Independent Power Producers
MAV+	Regional Health Manufacturing and Access to Vaccines, Medicines and Health Technology Products in Africa
MoU	Memorandum of Understanding
mRNA	Messenger ribonucleic acid
NDICI	Neighbourhood, Development and International Cooperation Instrument
NDICI-GE	Neighbourhood, Development and International Cooperation Instrument – Global Europe
NGO	Non-governmental Organisation
PGII	United States (US) Partnership for Global Infrastructure and Investment
PPPs	Public-Private Partnerships
SMEs	Small and medium-sized enterprises
TEI	Team Europe Initiative
TNI	Transnational Institute
TUED	Trade Unions for Energy Democracy

Executive Summary

As a starting point of her new mandate at the head of the European Commission, President Ursula Von der Leyen wrote "The third strand of our economic foreign policy is partnerships and investing together in our interests and our partners through Global Gateway, our initiative to invest in infrastructure projects worldwide".[1]

This illustrates the current perception of the Global Gateway strategy among the political leadership of the EU, namely that of a central element of the EU's foreign economic policy, pursuing both the EU's interests and those of its partners.

Launched in 2021 by the European Commission, it has been promoted as the EU's 'positive offer' to countries in the Global South. It is framed as a sustainable, values-based, and transparent alternative to China's growing geopolitical and economic presence in the world through its Belt and Road Initiative. The goal is to mobilise up to EUR 300 billion of investment between 2021 and 2027.[2]

The Global Gateway strategy supports investment in five priority areas: the digital sector, climate and energy, transport, health, and education and research. It offers physical infrastructure such as subsea cables, transport corridors, and renewable energy on the one hand, and it promotes a reform agenda to create an 'enabling business environment' to facilitate European investments on the other.

However, on closer examination it becomes clear that there are many concerning issues with the Global Gateway. Those concerns are based on the fact that the Global Gateway's main source of funding is the EU's development cooperation policy and budget, whose primary mission, according to the EU's founding treaties, is "the reduction and, in the long term, the eradication of poverty".[3]

This report attempts to answer this central question: is the Global Gateway prioritising the EU's foreign policy goals and its own economic interests over positive development outcomes in its partner countries?

This report builds on previous Counter Balance and Eurodad research[4] and provides a timely and comprehensive analysis of the Global Gateway, including its financing, governance, and latest projects. It analyses whether the projects rolled out so far – notably in energy and climate (including raw materials), digital, and health sectors – correspond with the EU's development objectives and external action principles, such as the eradication of poverty and inequality, protection of human rights, and sustainable development.

It focuses on a detailed analysis of 40 projects falling under the Global Gateway (listed at Annex 3), many of which are categorised as Global Gateway 'flagship' projects (all listed at Annexes 1 & 2), covering different regions and sectors and chosen as illustrative examples. These projects were also chosen due to the availability of more detailed information and literature from external sources (academia, media, civil society organisations, and other stakeholders).

In 25 of the 40 Global Gateway projects explored, at the time of writing the report at least one European company benefited from the project (see Annex 3). The companies benefitting include large companies such as Siemens, A.P. Moller Group, SUEZ, and BioNTech. The presence of European companies in the majority of analysed projects points to a high risk that the Global Gateway prioritises the promotion of opportunities for European businesses in the Global South over development objectives such as poverty reduction.

What started as an EU branding strategy[5] has grown into a central external action approach, increasingly influencing other key EU policies, such as the Green Deal Industrial Plan and the Critical Raw Materials Act. At the same time, the EU's actions to implement the Global Gateway risk contradicting its own commitments to upholding high standards of human, social, and workers' rights, transparency, creating equal partnerships instead of dependencies, and offering a democratic investment agenda.

The findings

This report finds that the EU's Global Gateway has led to three key issues that undermine the strategy's ability to deliver positive development outcomes. These are:

A. **The Global Gateway promotes the EU's commercial and geopolitical interests, encourages the privatisation of infrastructure and public services in the energy sector in the Global South, and risks increasing the debt burden of partner countries. A question arises as to whether the priority of the Global Gateway is to enable EU investments globally or to fight poverty and inequality worldwide.**

   Global Gateway projects are present in 29 of the 37 heavily indebted poor countries (HIPC), thereby risking the capacity of partner countries to satisfy their citizens' basic needs and rights. The report also shows that the Global Gateway enables investments by private companies from the EU's largest economies in countries with historical colonial links, thereby raising concerns of a neocolonial approach – syphoning resources from the Global South at the expense of local development.

B. **There is a risk of negative impacts on human rights and the environment.**

   Risks include negative impacts on people's jobs and livelihoods (for instance in the case of the waste management sector), on access to land and resources, and on the right to health, with negative consequences for the delivery of public services. These risks are exacerbated by the fact that the Global Gateway intervenes in contexts already characterised by human rights violations. Damaging environmental impacts are also a significant risk. This includes projects involving fossil fuels, such as hybrid power plants that use both solar energy and diesel, and projects with a major environmental footprint, such as hydrogen projects, lithium mining, or data centres, as well as port expansions, airports, and transport corridors. In the particular case of hydrogen, 4 out of 13 water-intensive hydrogen projects under the Global Gateway are planned in countries with high water stress. The Global Gateway still finances polluting giants – TotalEnergies and Enel are members of its Business Advisory Group – for their renewable energy projects, despite fossil fuel companies' lack of credible decarbonisation plans and backtracking on their climate promises.[6]

   Among the Global Gateway projects features a concerning raw materials agreement signed between Rwanda and the EU. It takes place in the context of the ongoing armed conflict in the DRC's mineral-rich province in which Rwanda is accused of being involved, and which could pose a risk that the agreement exacerbates the conflict.

   Furthermore, the European Investment Bank (EIB), a key development finance institution implementing the Global Gateway, has been criticised by civil society organisations (CSOs), parliamentarians, academics, and journalists for its inadequate impact assessments, no clear and effective human rights due diligence, weak transparency standards, and lack of an independent complaints mechanism.[7] Instead of committing to the EU objective of 85 per cent of external actions contributing to gender equality, EIB Global commits only to 30 per cent of its "share of operations" doing so. These factors raise concerns about the credibility of the Global Gateway's rights- and values-based narrative.

C. **The way in which the Global Gateway has been developed and implemented has not been democratic or transparent**.

   The Global Gateway was unilaterally introduced by the European Commission and the High Representative/ Vice President of the European Commission, excluding Global South countries from its design, governance, and priority-setting process from the start. Elected bodies (including parliaments), civil society, and independent experts in recipient countries have no meaningful role in decision-making or accountability. Instead, EU officials and development finance institutions make top-down decisions about what kind of projects to support with EU funds, while fostering engagement with big corporate interests. This contradicts the Global Gateway's principle of equal partnerships and projects that "will be designed, developed and implemented in close cooperation and consultation with partner countries".[8]

   Even though the European Commission has created a Global Gateway Civil Society and Local Authorities Advisory Platform,[9] this is currently little more than a 'tick-box' exercise, as it is unable to influence the approach, selection, and design of projects. At the same time, the involvement of the Business Advisory Group, which is made up of 59 large, mainly European companies and business associations,[10] is quite dominant: its members' names appear in Global Gateway projects, such as in the Medusa subsea cable developed with the participation of Orange and Alcatel, owned by Nokia.

There is a gaping hole in publicly accessible information on projects' financing, tendering processes, awarded contracts, and independent and transparent financial, human rights, and environmental assessments. This makes it impossible to monitor and evaluate how projects contribute to development objectives, or the risk of negative impacts in recipient countries.

The way forward

As a new European Parliament and new College of Commissioners take office, this is a key moment to shift course. The Fourth United Nations Conference on Financing for Development, to be held in Spain in mid-2025, also offers an opportunity to refocus the EU's role at the global level. The EU should engage in this process by putting the needs of low-income countries at the forefront of its strategies going forward.

This report calls on EU institutions and Member States to consider the following policy recommendations:

A. Re-evaluate the Global Gateway strategy without further delay. This should include:

- Reaffirming the primary missions of the Global Gateway (as an EU instrument of development cooperation and as a vehicle to channel Official Development Assistance (ODA)), namely poverty reduction worldwide, the sustainable development of the planet, solidarity and mutual respect among peoples, and the protection of human rights, in particular the rights of the child. The other objectives currently assigned to the Global Gateway, such as foreign policy goals and promoting the EU's economic interests, cannot be pursued with EU ODA.
- Working with the Global South to produce a strong cooperation strategy rooted in sovereignty, self-sufficiency, and a just international cooperation framework.
- Prioritising projects promoting regional cooperation instead of country by country projects, which present a convenient opportunity for European companies but can risk fuelling a race to the bottom among states to attract investments.
- Supporting public-public partnership projects and civil society organisations with grants-based finance to ensure the provision of public services and sustainable infrastructure with social and environmental benefits.
- Including companies in projects where there is strong and clear evidence of long-term development additionality. Prioritising local companies, especially women-led, that support environmental sustainability and the socio-economic needs of Indigenous and local communities.
- Publishing the specific deliverables and indicators contributing to the reduction of poverty and inequalities – including gender – for each project, which must allow clear accountability and evaluation of the projects to determine what are the impacts of the investments and who benefits from them.

B. Adopt high standards in the Global Gateway's decision-making, procurement, transparency, and implementation processes. At a minimum, this should entail the following measures:

- The European Commission must make publicly available all minutes of meetings between its officials and members of the Business Advisory Group, where the Global Gateway is discussed.
- The European Commission must provide evidence that the Global Gateway is not a source of favouritism for EU Member States' own economic sector and a way of promoting informally tied aid.
- All documents that the European Commission and Development Finance Institutions (DFIs) have to support their project selection should be made public. DFIs implementing Global Gateway projects, such as the EIB, must make each project-related debt assessment publicly available.
- The selection criteria for and beneficiaries of contracts awarded to companies, and guarantees and grants for projects under the European Fund for Sustainable Development Plus (EFSD+), must be published, as well as disaggregated data on total project finance from all public and private sources.
- Business trips, missions, and activities focused on supporting EU corporate interests related to Global Gateway projects should not be financed by the EU development budget.
- Only private sector companies that comply with the highest standards of due diligence, as set out in the EU Corporate Sustainability Due Diligence Directive, should be eligible to implement Global Gateway projects. Furthermore, companies need to ensure collective bargaining rights, fulfil labour standards in line with ILO recommendations, be aligned with the Paris Agreement, and demonstrate a clear contribution to development objectives.

C. **Put in place processes and mechanisms to allow for public and parliamentary scrutiny of the Global Gateway, both in Europe and in the Global South**. The European Parliament and civil society organisations should be allowed to formally scrutinise the Global Gateway strategy and its implementation. In its current form, the Civil Society and Local Authorities Advisory Platform has major limitations. The mandate and role of the platform has to be fully transformed, and it must allow for the inclusive participation of all interested CSOs and women rights' organisations in scrutinising the Global Gateway's implementation to date. CSOs should have an active role in the selection, design, and implementation of all projects receiving support from the EU development budget and EU external investments. Additionally, CSOs should continue to have access to independent and well-resourced funding channels to strengthen their work and societal role, enabling them to choose their work areas based on their own priorities.

D. **Review the alignment of the Global Gateway with the EU's development objectives before the EU budget for the period post-2027 is approved**. The European Court of Auditors (ECA) should carry out an evaluation of the Global Gateway's alignment with the EU's development objectives. A public civil society consultation should be carried out by the European Commission to evaluate the Global Gateway so as to ensure that CSOs help to shape the EU's next development cooperation strategy. The new College of Commissioners for the period 2024-29 should follow the development and external action mandate set out in the EU's Treaties and ensure that development policy is not a strategy to generate corporate profits.

The key question is – what are the real benefits for the Global South? The lack of evidence from the EU proves that the Global Gateway as it is now cannot be the key strategy for EU development and external action. As one of the most powerful development actors, the EU has the resources and capacity to contribute to poverty reduction and the fight against the climate crisis and inequalities, rectifying decades of systemic injustice and exploitation. It must adhere to a vision for a just global transition built on principles of equality, rights, sovereignty, socio-economic development, and a fair international financial architecture.

Solar in Madagascar. © Shutterstock

Introduction

Officially launched on 1 December 2021 by the European Commission (EC) and the High Representative of the Union for Foreign Affairs and Security Policy (see Box 1),[11] the Global Gateway has become arguably the main reference for EU policy towards the Global South.

In EU-speak, the Global Gateway has been promoted as the bloc's 'positive offer' for its partner countries in the Global South, framed as a democratic, value-driven approach to investments with a high-level of transparency and good governance.[12] It is promoted as a sustainable alternative to China's growing geopolitical and economic presence in the world through its Belt and Road Initiative, which was conceived to finance large infrastructure projects like hydropower dams. Recognising that such projects lead to hard-to-repay debt in the Global South, China has moved towards supporting smaller projects in sectors such as raw materials, technology and renewable energy, and digital finance – a shift moving the EU and China even closer into competition.[13]

The origins of the strategy date back to the idea of using 'connectivity' – the fostering of deeper economic and people-to-people ties based on principles of a level playing field, free trade, and a market economy, among others.[14] However, the Global Gateway's promotion of European investments goes beyond competitiveness with China alone, aiming also to secure opportunities for European businesses facing competition from other countries, such as the United States. In addition, measures taken around the world in response to the Covid-19 pandemic exposed vulnerabilities in European supply chains for raw materials and goods coming into Europe from elsewhere, and the desire to minimise this vulnerability has also been a key factor shaping the Global Gateway (see Chapter 4).

Box 1. Excerpts from the EU's Global Gateway Joint Communication

"By offering a positive choice for global infrastructure development, Global Gateway will invest in international stability and cooperation and demonstrate how democratic values offer certainty and fairness for investors, sustainability for partners and long-term benefits for people around the world."

"In assisting others, the EU will also be contributing to the promotion of its own interests, to strengthening the resilience of its supply chains, and to opening up more trade opportunities for the EU economy, in which approximately 38 million jobs are dependent on international trade."

"The EU will offer its financing under fair and favourable terms in order to limit the risk of debt distress. It will help build sustainable infrastructure with the support, skills and the finance needed to operate it. Without proper transparency, good governance and high standards projects can be badly chosen or designed, left incomplete or be used to fuel corruption. This not only stunts growth and deprives local communities but it ultimately creates dependencies, which can limit countries' ability to make decisions."

While the Global Gateway is not a formal legal instrument of the EU, it follows a broader revamping process of its external action aimed at reducing fragmentation and bringing coherence to Member States' interventions in order to secure stronger geopolitical clout for the EU.[15]

However, there are serious questions that must be addressed about whether a strategy that appears to be built on geopolitical, economic, and corporate interests of the EU can truly fulfil its development objectives.

Previous research carried out by Eurodad and Counter Balance, published in 2022, provided an early look at the design and objectives of the Global Gateway. It concluded that it was not aligned with the urgency of the climate crisis and necessary transition to sustainable economies, failing to provide a credible development strategy that could help deliver basic needs, reduce inequalities, and promote and uphold human rights.[16] Since then, many Global Gateway 'flagship' projects have been announced and promoted, allowing for a closer look at the implementation of the strategy and its core approach of using development money to create profit-generating opportunities in the Global South.[17]

This report provides the most up-to-date and comprehensive overview of the Global Gateway on the basis of information available from a wide range of sources, including the EC, academia, media, civil society organisations (CSOs), and other stakeholders, and examines whether the projects rolled out under this branding correspond with the EU's development objectives, such as the eradication of poverty and inequality, the provision of essential services, and the covering of people's basic needs. It specifically looks at projects in the Global Gateway's energy and climate (including raw materials), digital, and health sectors, as they are essential areas of development policy and receive major publicity from the EU with regard to the Global Gateway.

The report is structured as follows. The first chapter gives an overview of key aspects of the Global Gateway, namely its objectives, financing, and governance model, as well its alignment with the EU's development goals and gender policies. Chapters two to six look at the current level of implementation and impact of the Global Gateway in key sectors and projects – energy, climate, raw materials, digital, and health. The closing chapter summarises the findings of the report and provides policy recommendations.

Methodology

This report builds on a joint briefing published by Eurodad and Counterbalance in 2022. It draws on a general overview of the publicly available information on the flagship projects approved by the EC for 2023 and 2024. There are 225 such projects in total (see lists in Annexes 1 and 2). A more detailed analysis was conducted on 40 projects covering different regions and sectors (see list in Annex 3), selected on the basis of the availability of information from external sources (academia, media, CSOs, and other stakeholders). Many of these are flagship projects. However, as this report relies on publicly available information, we are not able to link all of them to a flagship project.

The authors also conducted in-depth semi-structured interviews with five CSOs working on various aspects of the Global Gateway (Africa Platform, Global Health Advocates, ODG, SOMO, and Wemos) and engaged in regular communication with the EC. They made use of extensive research by other CSOs, think tanks, and academics. Moreover, a group of 18 sectoral and regional experts, including civil society based in the Global South, reviewed and commented on the findings of the report (see full list in the Acknowledgements section).

Comprehensive quantitative analysis of the financing of specific projects was limited by the fact that there is insufficient information on Global Gateway projects. Moreover, the nascent stage of many flagship projects, and a lack of information published by the EC and development finance institutions, makes an analysis of their impacts on the ground difficult. At the time of publishing this report, some projects are not yet in the implementation phase.

However, the information available does allow the identification of worrying patterns and trends that the Global Gateway is imposing on the EU's development cooperation and climate action agenda. This has allowed the development of a deeper understanding of its key approach, challenges, and risks, and the next steps.

1. What is the Global Gateway?

The European Commission describes the Global Gateway as an "EU plan for major investment in infrastructure development around the world".[18] In essence, it is a new branding strategy for the EU's development cooperation approach in the current global geopolitical and economic environment.[19] It puts emphasis on supporting investments in areas such as climate change, sustainable development, raw materials, global health security, and resilient, open, and reliable supply chains. It seeks to provide physical infrastructure, such as subsea cables, transport corridors, and renewable energy infrastructure, and to foster an 'enabling environment' to encourage private sector investment.

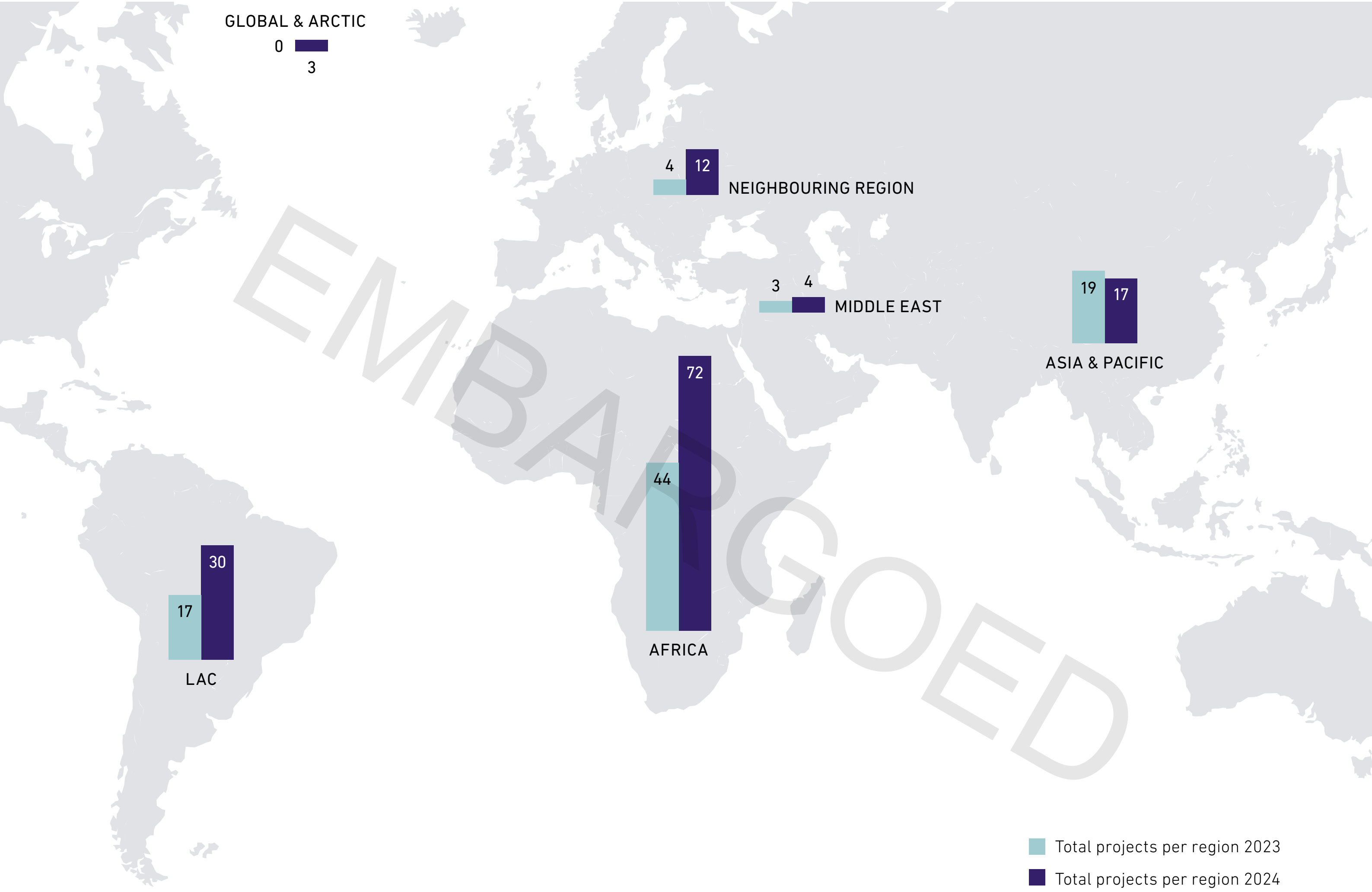
1.1 Sectors and policy areas covered by the Global Gateway

So far, 225 projects have been branded 'flagships' to cover five priority areas – the digital sector, climate and energy, transport, health, and education and research. As Table 1 shows, in 2023, the list included 87 flagship projects, adding 138 in 2024, growing to a total of 225 flagship projects for both years. The sectors that received the greatest attention in both years are climate and energy (49 per cent), followed by transport (22 per cent) and digital (13 per cent). Meanwhile, education and health received the least attention – 7 per cent and 9 per cent in both years respectively.

Table 1: Global Gateway flagship projects, by sector and year

Sector	N° of projects in 2023	Share of all projects in 2023	N° of projects in 2024	Share of all projects 2024	Total N° of projects in 2023-24	Share of all projects in 2023-24
Climate and Energy	49	56%	61	44%	110	49%
Transport	17	20%	32	23%	49	22%
Digital	11	13%	18	13%	29	13%
Health	7	8%	14	10%	21	9%
Education and Research	3	3%	13	10%	16	7%
Total	87	100%	138	100%	225	100%

Figure 1: Global Gateway's flagship projects across the world



As Figure 1 illustrates, these projects cover all the regions of the world, with a significant increase in projects targeting Africa and Latin America, when comparing flagship projects in 2023 and 2024.

However, EU Member States, development finance institutions (DFIs), and the private sector also use the Global Gateway branding for projects that are outside of the official process of flagship project selection, led by the EC.[20]

To be selected as a Global Gateway flagship project, they should:[21]

- create added value in partner countries with a transformational impact and a sizeable infrastructure component
- be aligned with Global Gateway sectors, regions, and values
- meet the interests of the partner countries and the EU
- be funded by substantial contributions from the EU, EIB, EBRD, and/or Member States
- deliver a concrete and visible milestone during the year.

To deliver these investments, the initiative sets out six key principles:

- democratic values and high standards
- good governance and transparency
- equal partnerships
- green and clean
- security focused
- catalysing private sector investments.[22]

What started as a Global Gateway 'branding strategy'[23] has now grown in relevance across the EU's external and internal policies, legislation, and financing programmes. This includes, for instance, the Green Deal Industrial Plan, which complements the Green Deal and aims to support achieving the EU's green industrial transformation through facilitating 'clean tech' investments, and the Critical Raw Materials Act aiming to secure European raw-materials supply chains.[24]

The Global Gateway follows the so-called 'Team Europe' approach to EU development cooperation introduced during the COVID-19 pandemic, aiming to improve the coordination of Member States, their national development banks and agencies, the EU, the European Investment Bank (EIB), and the European Bank for Reconstruction and Development (EBRD), as well as to increase the visibility of EU external action.[25]

1.2 Sources of financing of the Global Gateway

The Global Gateway sets out to mobilise up to EUR 300 billion in investments between 2021 and 2027. This will be done by using resources from European financial institutions, Member States, and the EU budget to 'crowd in' private sector finance.

It is implemented under the Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI-GE), the EU's main instrument for development cooperation in the 2021-2027 Multiannual Financial Framework (the EU's seven-year budget), which was allocated a sum of EUR 79.5 billion, most of which goes to projects based on geographic scope.[26] NDICI-GE commits to contribute towards the EU collective objective of dedicating 0.7 per cent of GNI to Official Development Assistance (ODA) and states that at least 93 per cent of funding will meet the requirements of the OECD Development Assistance Committee and hence count as ODA. Moreover, NDICI-GE commits that 85 per cent of actions should support gender equality and 30 per cent of the funding should support climate objectives.[27] No new separate funding streams for the Global Gateway were created.

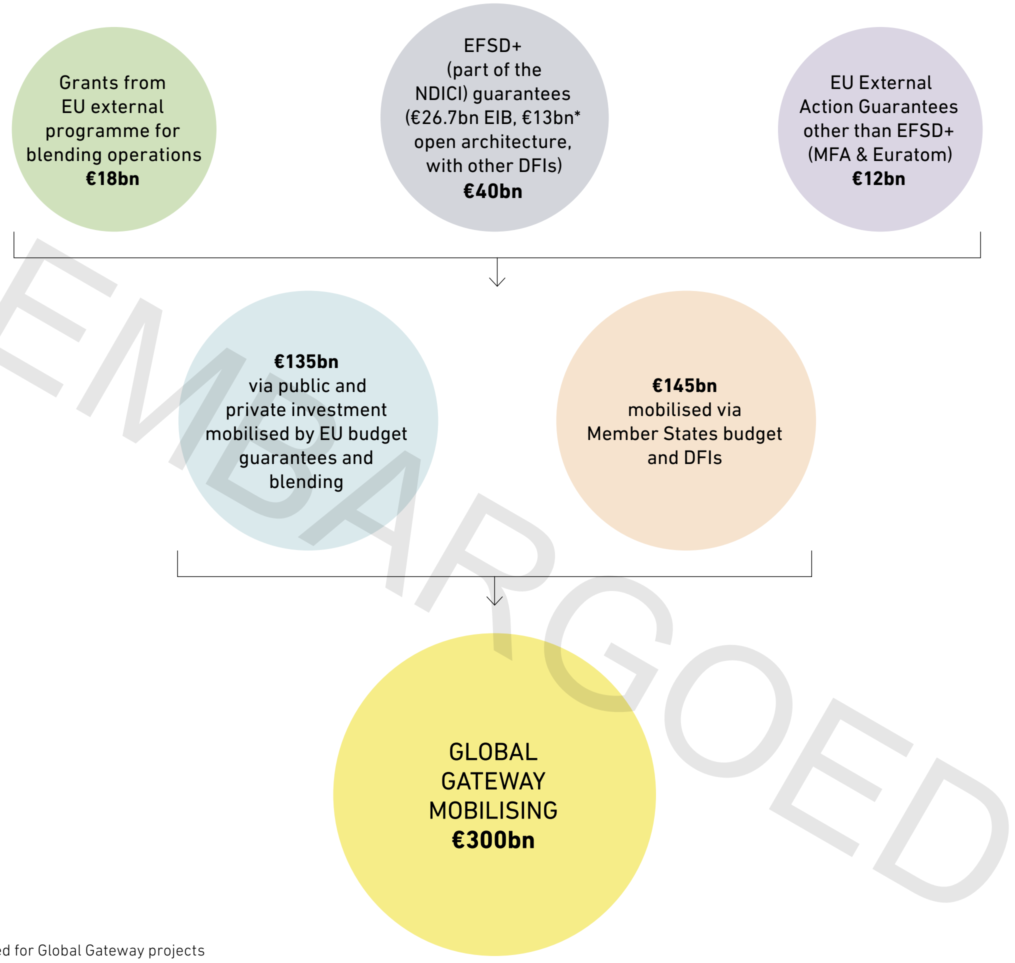
As Figure 2 shows, the Global Gateway is financed through a pool of different sources. EUR 53 billion from the EU's External Action Guarantee is used to finance Global Gateway projects. This mainly consists of the European Fund for Sustainable Development Plus (EFSD+), the financial arm of the NDICI-GE.[28] It offers EUR 40 billion in guarantees for implementation by DFIs, including EUR 26.7 billion for the EIB and EUR 13 billion in EFSD+ Open Architecture Guarantees (of which 50 per cent are available under a specific Global Gateway window; see Box 2).[29] In terms of grant-based finance, EUR 18 billion of grants are available for various purposes such as so-called blending operations, or budget support and technical assistance in directly EU funded projects (see Box 3).[30]

Other tools include technical assistance and project co-financing from the following programmes: the Instrument for Pre-Accession Assistance (IPA) III, Connecting Europe Facility, Horizon Europe, InvestEU, and Interreg, as well as export credit finance.[31] In addition to financial tools, the Gateway includes operational tools – such as policy and economic dialogue, and trade and investment agreements and standardisation – to facilitate conditions for investments.[32]

With these funds, it is projected that EUR 135 billion will be mobilised as additional private or public investments, and EUR 145 billion will be leveraged from Member States' financial and development finance institutions. Combined with the EUR 18 billion of grants for blending operations the Commission aims to reach the targeted EUR 300 billion.

The main financing tool used to support Global Gateway projects is guarantees, a type of insurance meant to protect financial institutions and private investors from the risks of non-payment. Protecting or lowering the risk of financial institutions and investors (i.e. 'de-risking' them) lies at the core of the Global Gateway strategy.

Figure 2: Financial structure of the Global Gateway



*50% of the €13bn is reserved for Global Gateway projects

The Global Gateway follows a development finance trend that has been employed by the Global North over the past decade, relying on mobilising private sector investments for development projects as the main way to generate additional development funds. In practice, this narrative emerges as donors, such as the EU, fall short of providing adequate grant-based finance and fail to meet their own ODA commitments. Yet, the Global Gateway goes a step further. On top of using private investors to cover a lack of public funding for development targets, the strategy also uses public development funds to boost European countries' economies and companies.[33]

Officially, the Global Gateway proposes "an ethical approach so that infrastructure projects do not create unsustainable debt or unwanted dependencies".[34] Yet, our research shows that Global Gateway projects are present in 29 of the 37 heavily indebted poor countries (HIPC), as per the World Bank calculation.[35] This poses a serious risk as debt sustainability analyses of banks like the EIB are carried out on the basis of the World Bank/International Monetary Fund (IMF) methodology, which ignores human rights, climate justice, and gender justice aspects, as well as the right to development. As the Global South countries' public resources are swallowed by debt repayments at the expense of needed public investments, the Global Gateway stands in stark contrast to the necessary reforms of the international financial architecture and debt justice.[36]

The current international financial architecture benefits large, private financial actors and rich countries in the Global North, following centuries of colonial profits and debt imposition on the Global South. In 2023, 38 per cent of budget revenue and 30 per cent of spending in the Global South went to debt servicing.[37] In 2024, they are likely to pay out USD 50 billion more in debt than they receive in aid.[38]

1.2.1 Key implementing actors of the Global Gateway: Development Finance Institutions

To achieve the goal of mobilising EUR 300 billion in investments, DFIs are the key implementing actors of the Global Gateway – EIB Global, the development branch of the EIB, at the European level, and national development banks such as Agence Française de Développement (AFD), Kreditanstalt für Wiederaufbau (KfW), and Compañía Española de Financiación del Desarrollo (COFIDES). EIB Global (see Box 2) implements the largest share of the EU guarantees made available for the Global Gateway. Regional development banks can act as Global Gateway external partners, such as the African Development Bank (AfDB), the Inter-American Development Bank, and the CAF-Development Bank of Latin America and the Caribbean.

The Global Gateway is promoted as an offer with democratic values and high standards in transparency, human rights, and sustainability. Yet, development banks such as EIB Global have been criticised by CSOs for weak transparency and accountability, human rights violations, and environmental damage. CSOs have stressed that projects often lack clear development additionality, and seem instead to focus on good financial returns for investors. Moreover, top-down decision-making structures allow sidelining of recipient countries, while complaints mechanisms and redress for rights violations remain inadequate.[39] The bank needs to reform its human rights and environmental policies, and ensure it contributes to national and local development needs in the Global South.[40]

EIB Global can play an important role in providing development and climate finance at highly concessional terms to support development projects around the world, as high borrowing costs undermine countries' ability to finance development needs and the fight against climate change.[41] The EIB recognised the need for such concessional climate finance in low-income countries in its Climate Bank Roadmap.[42] However, the EIB is currently failing to do so: it substantially decreased the share of concessional loans and equity of its total climate lending, which went down from 19 per cent in 2017 to 2 per cent in 2021.[43]

Box 2: The Global Gateway and the European Investment Bank

The influence of the Global Gateway is evident in the EIB's strategy, where the bank commits to prioritise the Global Gateway.[44]

EIB Global – the development branch of the EU's main public bank and the largest multilateral financial institution globally – implements EUR 26.7 billion in EFSD+ guarantees worldwide, intended mainly for public sector infrastructure, but also with the aim of using the guarantees to de-risk private investors.[45] By the end of 2023, EIB Global had signed 95 projects for an amount of more than EUR 8 billion under EFSD+/NDICI-GE.

Just in the first phase of the Global Gateway's implementation, the EIB has already reached 60 per cent of the overall EUR 100 billion target, according to the information shared by the bank. EIB finance was expected to mobilise EUR 60 billion of investments for Global Gateway operations by the end of 2023.[46]

In addition, half of the EUR 13 billion from the remaining EFSD+ guarantees – made available under the so-called 'Open Architecture' (also referred to as open access guarantees) to DFIs, including the EIB – is allocated to the Global Gateway.[47] These guarantees are intended to support investments in more commercially viable activities, including those subcontracted to or directly implemented by the private sector – such as loans to public water and sanitation companies, or national electricity companies, or private renewable energy projects.[48] In 2022, EUR 5.7 billion were provided in such guarantees.[49] The website of EFSD+ lists 6 programmes that have access to just over EUR 1 billion in guarantees, aiming to reach 40 Open Architecture guarantees in total by the end of 2024.[50] However, the total amount of guarantees and investment so far remains unclear.

In principle, EIB Global uses the EFSD+ guarantees for high-risk loans which it won't finance with its own resources, such as those that might have higher expected losses, take place in a country or with a counterparty with a low rating, or are a first-of-a-kind operation in a novel sector or a new market. The validity of this remains to be assessed given previous concerns with its unclear rationale for EU guarantee allocation in other investments inside the bloc.[51] Projects that want to benefit from an EFSD+ guarantee must be aligned with the objectives of the NDICI-GE regulation,[52] relevant programming documents,[53] and Global Gateway priorities,[54] and they must go through a rigorous assessment process from the European Commission and approval by the EIB's governing bodies. Three strategic areas for EFSD+ guarantee can be selected in the application: Global Gateway, Green Deal, or Jobs and Inclusive Growth.

The EIB also set up a Global Gateway Fund, a 'fund of funds' to which it contributed EUR 300 million for high impact equity and debt operations in emerging markets. It will support private sector operations, including infrastructure funds and small and medium-sized enterprises (SME) funds.[55]

1.2.2 Key financial instruments used to implement Global Gateway projects

The European Fund for Sustainable Development Plus (EFSD+), the financial arm of the NDICI-GE, is a leading financing instrument of the Global Gateway.[56] It offers EUR 40 billion in guarantees for implementation by DFIs, including EUR 26.7 billion for the EIB and EUR 13 billion in EFSD+ Open Architecture Guarantees (of which 50 per cent are available under a specific Global Gateway window; see Box 2).[57] In terms of grant-based finance, EUR 18 billion of grants are available from EU external assistance programmes for the so-called blending or blended finance operations (see Box 3).[58]

With these funds, it is projected that EUR 135 billion will be mobilised as additional private or public investments, and EUR 145 billion will be leveraged from Member States' financial and development finance institutions, but – as highlighted above – it is not clear how this adds up to the targeted EUR 300 billion.

The Global Gateway Africa–Europe Investment Package (formerly Africa Investment Facility (AfIF)) takes up half of the overall Global Gateway financing targets, with a total objective of EUR 150 billion.[59] The EU committed to leveraging EUR 45 billion under the EU–LAC Global Gateway Investment Agenda for Latin America and the Caribbean, EUR 10 billion for the Association of Southeast Asian Nations (ASEAN), and a further EUR 10 billion for Central Asia.[60]

Box 3: Blended finance

EUR 18 billion of grants are available for the Global Gateway from EU external assistance programmes for the so-called blending or blended finance operations. This is a combination of public concessional finance (finance with more generous terms than the market has to offer) from development finance institutions (DFIs), and public or private resources.[61] Regionally, in overall EU blending operations approved by DG INTPA, 27.5 per cent cover Africa, 11.4 per cent Latin America and the Caribbean, and 6.7 per cent Asia Pacific.[62]

Blended finance aims at mobilising additional private or public investments from other actors. It means that guarantees, as well as grants, loans, and in some cases equity investments, are used in one package to support projects in recipient countries that are not offering immediate financial returns (they are not 'bankable') and cannot rely only on guarantees to take off, but offer 'public added value'.[63]

In practice, blended finance relying on leveraging private sector investments is a problematic model for development finance. Research indicates that it does not prioritise pro-poor activities such as provision of public services and infrastructure to cover people's essential needs and rights, and it prioritises middle-income countries with better market conditions for the private sector.[64] It can lead to informally tied aid – that is, development aid tied to procurement of goods or services from the donor country. Evidence shows that blended finance can be untransparent, and can lack democratic accountability and participation. In effect, development ownership and alignment with national priorities can be overshadowed by economic motives.

Research also suggests that private finance is more expensive than public resources to support public services and infrastructure, and can also lead to financialisation of public services.[65] It is difficult to measure its ability to mobilise additional finance and to evaluate its real development impacts. Moreover, tendering for project partners, decision-making, project design, and monitoring and evaluation are all time- and money-consuming processes requiring substantial governmental capacities that place an additional burden on the Global South countries.[66]

In 2022, EIB Global had leveraged more than EUR 30 billion in investment for Global Gateway operations. As of the end of 2023, it was expected to mobilise EUR 60 billion of investments. With these calculations the bank considers that it had reached 60 per cent of the overall EUR 100 billion target much faster than was projected for the implementation of the Global Gateway, and it noted that it had substantially stepped up its own risk-taking capacity by lending EUR 6 billion at full own risk, greater than the risk generally accepted by the bank (an average of EUR 1.2 billion over previous years).[67] According to the EIB's 2023 financial report, lending for operations that entail more risk than the bank would generally accept increased from EUR 8.4 billion to EUR 10.4 billion in 2023.[68]

It is positive that the EIB assumes more risk in its lending, in principle increasing its willingness to support projects that might not end up generating good and fast returns. However, as the EIB does not systematically disclose information on the final beneficiaries of its lending, it is not possible to assess whether and to what extent the high-risk lending improves provision of public services covering basic needs and supports needed social infrastructure projects. This risk is further highlighted as the bank can approve project finance to national governments who are marked as official project promoters but who then lend the money onwards through procurement to companies.[69]

The unclear planning behind the Global Gateway is noted also by the private sector. BusinessEurope, a European lobby group representing businesses, criticised the Global Gateway's lack of clarity, transparency, and information on the projects, stressing that "further clarity is needed on the process of identification of flagships, their state of play, their different components, the stakeholders (beneficiaries and funders) involved, and the strategic priorities pursued in their implementation".[70]

Box 4: Public-Private Partnerships

Infrastructure Public-Private partnerships (PPPs) have been a key example of development finance supporting private sector investments.[71] While there is no universally agreed definition of PPPs, in this report they are understood as long-term contractual arrangements where the private sector provides infrastructure assets and services that have traditionally been provided by governments (such as hospitals, schools, prisons, roads, airports, railways, or water and sanitation plants), which include some form of risk sharing between the public and private sector.[72]

Implementation of PPPs often lacks public consultation and participation, while contract negotiations are untransparent and lack accountability. When Indigenous peoples could be affected, such implementation should also require effective Free Prior and Informed Consent processes. Moreover, PPPs are often more expensive than public-public financing, leading up to 30 per cent of higher costs. They risk posing a debt burden for the Global South countries, including on the people who end up shouldering the contractual debts through payment of service fees.[73]

The EU–LAC Global Gateway Investment Agenda explicitly promotes public-private partnerships.[74] More general information on Global Gateway projects that are implemented through PPPs is made public on the European Commission's website only selectively. There is information on the PPP model used for instance in a wind farm expansion in Cabo Verde (see Chapter 3) under the Africa–EU Green Initiative (which is also a Global Gateway flagship project).[75] Again here, a clear picture is not easily established due to a significant lack of transparency over financing models used in the Global Gateway's implementation, resulting in an inability to assess the projects' impacts.

The Global Gateway contains lower leveraging targets in comparison with the EU's financing programmes such as the Juncker plan or the NDICI. Its 'leverage factor' – i.e. its ability to mobilise private finance – is 3.4, on the basis of the EU's target to mobilise EUR 135 billion of investment with the EUR 40 billion of guarantees. In contrast, the Juncker plan's leveraging ratio of 15 was criticised by the European Court of Auditors (ECA), as the methodology of the EC and the EIB resulted in overstating the amounts of mobilised investments, and the Court recommended improving such estimations.[76] NDICI's ratio is 10, seeking to mobilise EUR 500 billion of private investments on the basis of EUR 53 billion of EU guarantees.[77] Based on the information provided by the EIB Global to have mobilised EUR 30 billion in 2022, the bank can reach its target of financing at least EUR 100 billion of the Global Gateway under the current Multiannual Financial Framework. However, the pace and quality of the EIB's investment portfolio is yet to be seen. The progress on the remaining two thirds of EUR 300 billion implemented by other national development banks still needs to be examined as well.

The ECA noted difficulties in the preparation and allocation of EFSD+ guarantees (see Box 5): information on the final use of funds was still unknown when calls for proposals started. The ECA also noted untransparent methodology to allocate funds, and shortcomings in the collection and processing of raw data needed to legitimise allocations decisions of NDICI funds in non-neighbourhood countries – which highlights the risk of geopolitical interests guiding the selection.[78]

Box 5: Guarantees under EFSD and EFSD+ Global Gateway Window

The Global Gateway has access to EUR 40 billion guarantees under the EFSD+ for global operations. In comparison, the EFSD provided EUR 1.75 billion guarantees for Sub-Saharan Africa and the EU Neighbourhood.[79] On top of this, the EIB benefited from the EU's External Lending Mandate guarantees of EUR 32.2 billion for the period 2014-2021, applicable to its global operations.[80]

Overall, EFSD has approved investments in almost 250 projects in Sub-Saharan Africa and the EU Neighbourhood, with an EU contribution exceeding EUR 5.7 billion in the period 2017-2021. This has been expected to mobilise EUR 55 billion in investments from partner development finance institutions.[81] Of that, the EIB concluded 17 operations for a total amount of €639 million. Only seven EFSD guarantees for EIB operations have been called (that is, used), totalling EUR 1 million.[82]

Implementation has been a huge concern for EFSD: its annual report for 2020 concluded that only one construction had started since 2017.[83] Even in June 2022, the European Commission reported that the EFSD was still in the early stages of implementation.[84]

Export credit finance has also become a prominent tool to support the Global Gateway through the so-called enhanced coordination between Export Credit Agencies (ECAs) and DFIs. ECAs are governmental, semi-governmental, or affiliated private institutions which provide loans, guarantees, and insurance backed by public budgets to companies largely from their countries for undertakings around the world. Their explicit role is the promotion of national commercial interests, which is far from development objectives serving recipient countries.

Enhanced coordination between ECAs and DFIs aims to facilitate exchange between ECAs and EU institutions. This is to promote key EU policy objectives ranging from the global competitiveness of EU industry, supply chain diversification, development objectives, digital and green agenda, and geopolitical objectives. In effect, this coordination can help encourage European exporters' participation in operations funded by DFIs, but it remains to be seen whether any development of local productive capacity of recipient countries with value added to the local economy will be part of these projects. The EC has already initiated several pilot projects, which include Ghana vaccine production, lithium mining in Argentina, and an e-buses network in Costa Rica.[85]

Overall, having access to concessional borrowing for investment in productive capacity can be an important development strategy for some Global South countries.[86] However, the national interests and commercial mandate of ECAs mean that export credit, and its enhanced coordination with development finance, poses a risk of increasing informally tied aid, thereby obstructing development of the local productive sector in the Global South and fostering dependencies on EU technologies and capital. Several projects where both ECAs and DFIs have been involved show excessive costs of projects, questionable development additionality, and complex financial structures with a view to generating attractive profit for the shareholders.[87]

ECAs lack sufficient transparency and accountability, and are only weakly regulated at the EU and OECD level.[88] They have been at the root of most developing country[89] debt owed to European governments.[90] When considered alongside the transparency, due diligence, and accountability deficiencies of DFIs, this enhanced coordination between ECAs and DFIs makes it difficult to prevent and address risks of human rights violations, environmental damage (such as ongoing fossil fuel investments or mining projects), and exacerbated debt burdens.[91]

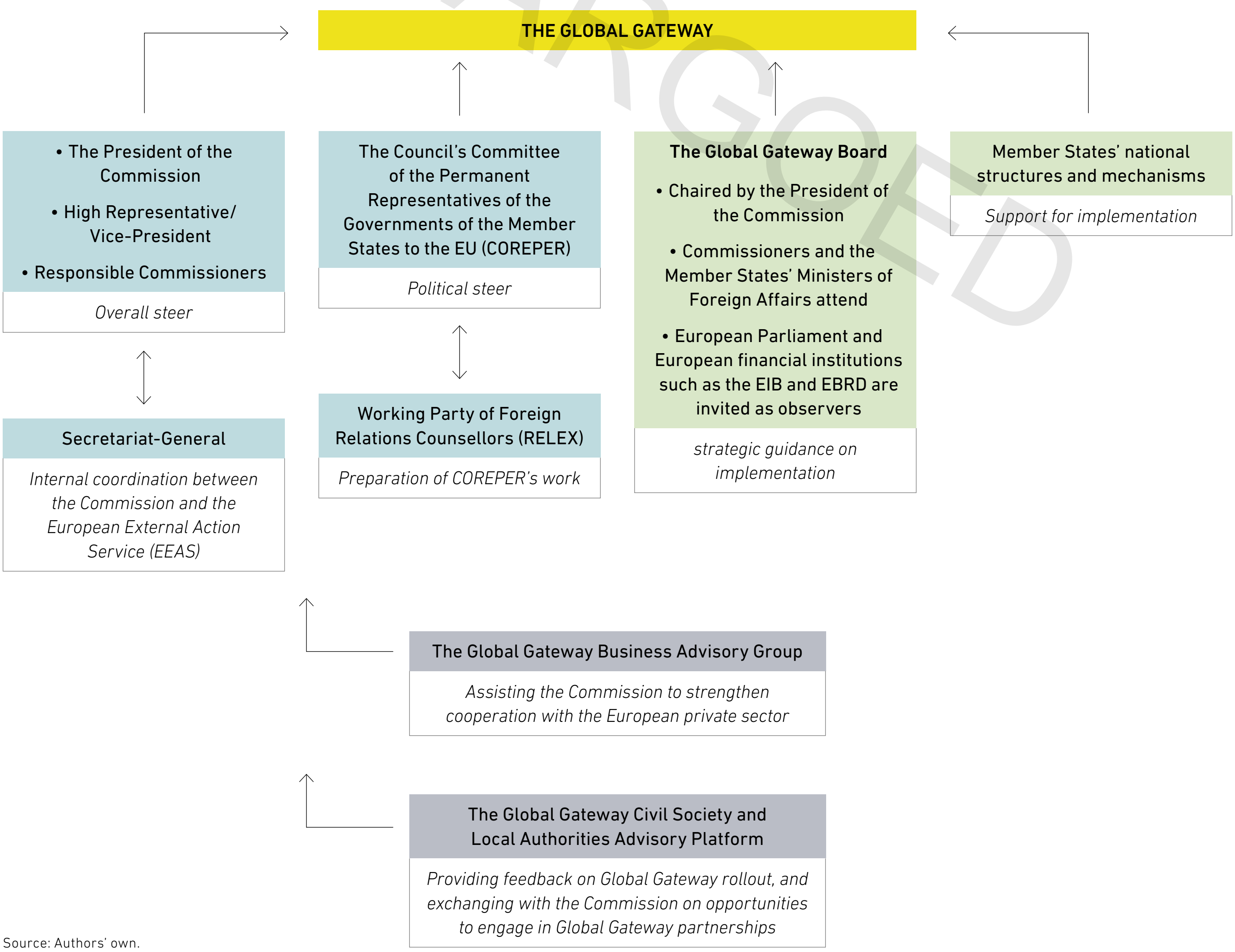
Lithium mine at Salinas Grandes salt desert Jujuy province, Argentina © EARTHWORKS/Flickr

1.3 The Global Gateway's governance

Unlike NDICI-GE, the Global Gateway is not a legal act and has no specific set of legally binding rules. Whereas the NDICI-GE Regulation legally establishing the instrument was negotiated and adopted by the Council and the European Parliament in 2021 – a process which included provision of inputs and evidence by CSOs – the Global Gateway was presented unilaterally by the EC and the High Representative/Vice President of the EC.[92] In effect, a top-down strategy that gains an increasing dominance in the EU's development policy is one that lacks democratic component, void of a meaningful parliamentary and public role in its preparation, implementation, and evaluation.

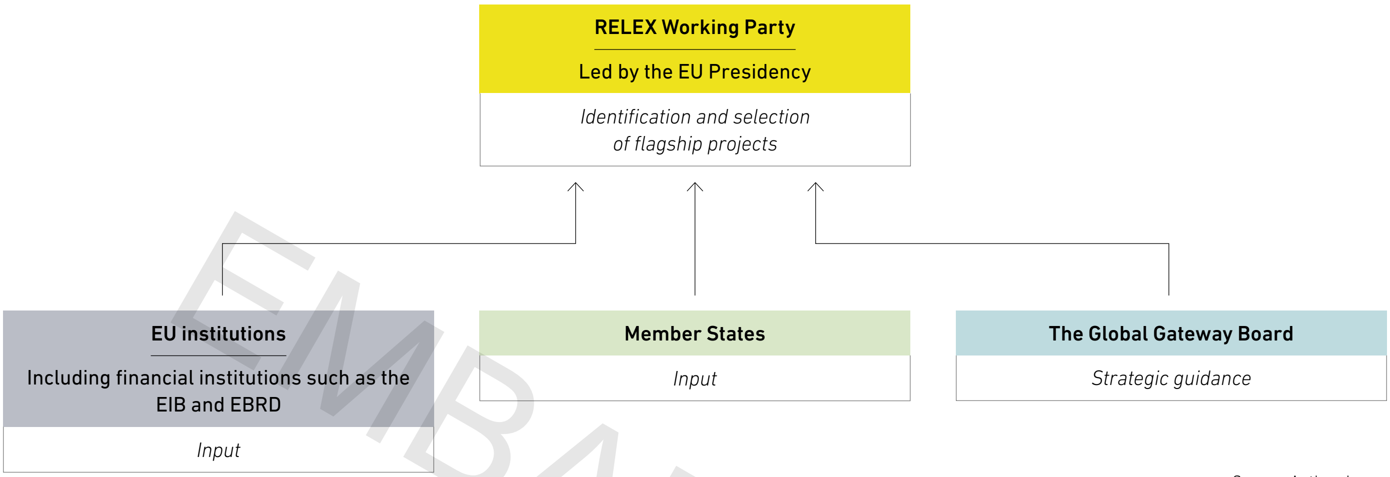
The EC's Directorate General for international partnerships (DG INTPA) is responsible for the Gateway, but other departments and institutions are involved, too, reflecting the Global Gateway's fluid and pervasive nature. As Figure 3 shows, at the highest EU level, implementation of the Gateway is steered by a committee that includes the EC President, the High Representative of the Union for Foreign Affairs and Security Policy/Vice President of the EC, and relevant representatives from across the EC.[93] The Global Gateway Board is responsible for strategic guidance on implementation and identifying opportunities to showcase the impact of Global Gateway initiatives. It is composed of the EC President and EU Ministers of Foreign Affairs, with the European Parliament invited as an observer, as well as ad hoc participation of representatives from DFIs.[94]

Figure 3: Global Gateway's governance structure



Source: Authors' own.

Figure 4: Global Gateway flagship projects selection



Source: Authors' own.

Moreover, DG Trade is involved by facilitating enhanced coordination with export credits or trade agreements (operational tools of the Global Gateway). The European External Action Service (EEAS) provides diplomatic outreach, including through EU Delegations in recipient countries, which can coordinate and identify projects and financing opportunities, and follow up on implementation.[95] EU delegations are also involved in facilitating Global Gateway business missions and fora, bringing European companies to countries of interest to discuss investment opportunities under the Global Gateway (to date, over 25 of these business fora have taken place).[96] DG for Internal Market, Industry, Entrepreneurship and SMEs (GROW) and for Neighbourhood & Enlargement Negotiations (NEAR) are also involved. A leaked external action draft blueprint for the new College of Commissioners after the European elections in June 2024 raises the concern about the DG INTPA's proposed consolidation of these fluid structures and using development funds for a new "policy mix driven by economic interest" involving DG TRADE, as well as DG Economic and Financial Affairs (ECFIN).[97] See Figure 4 for a simple representation of how Global Gateway's flagship projects are selected.

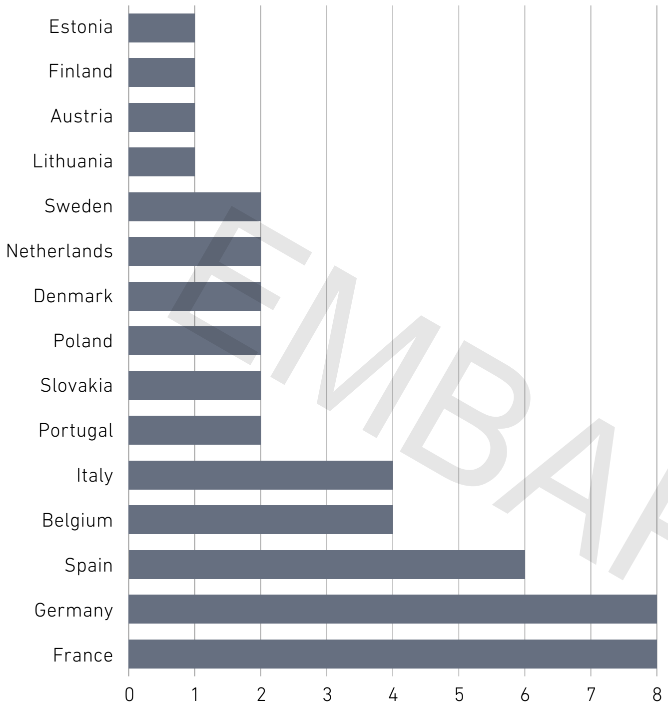
As Figure 3 shows, countries from the Global South are absent from the governance structure. According to AFRODAD, a regional civil society platform:

> **"The Global Gateway doesn't provide mechanisms for meaningful engagement with developing countries despite 'partnership' claims, while the rules are primarily dictated by the EC and EU Member States who hold decision-making power and control over how resources are allocated."**[98]

Two bodies involving external stakeholders exist as a part of the Global Gateway: a Business Advisory Group (BAG) and a Civil Society and Local Authorities Advisory Platform. They were formed long after the Global Gateway's launch in December 2021, in September and October 2023 respectively.[99] The BAG was, however, mentioned in name as being a central part of Global Gateway's governance in the original communication of December 2021, while the dialogue with civil society was mentioned only in vague terms.

The BAG is composed of 59 large companies and business associations from Europe (see Figure 5).[100] Most of the companies are French, German (both 13.6 per cent), Spanish (10.2 per cent), Belgian, and Italian (both 6.8 per cent). Associations of Global North companies represent the largest share of entities in the BAG (22 per cent). It is striking that only one association, the Belgium-based Alliance for Rural Electrification, seems also to represent companies from the Global South,[101] which reflects the key role that European corporate interests play in the Global Gateway's governance structure.

Figure 5: Number of companies across countries in the Business Advisory Group

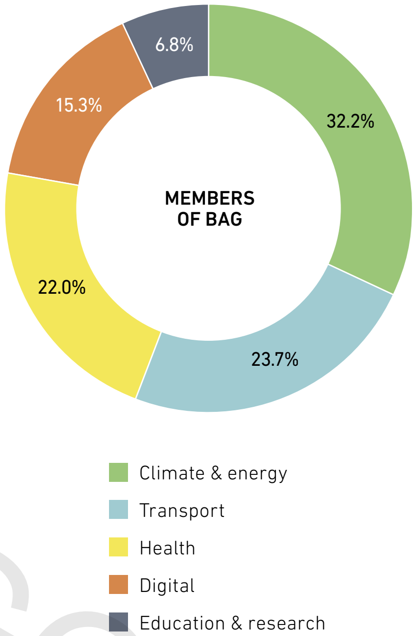


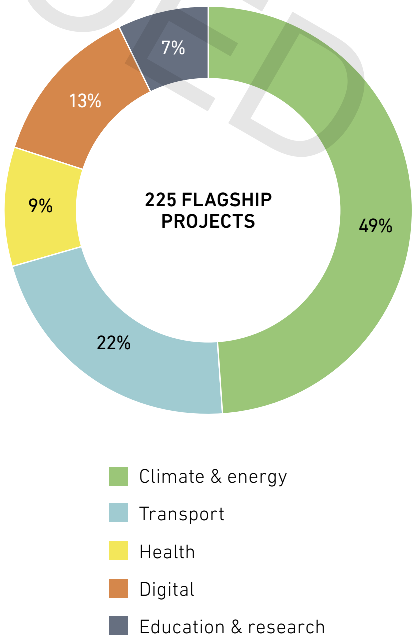
Source: Authors' own.

The BAG includes polluting giants like TotalEnergies, Volvo, Brussels Airlines, and Bayer.[102] As discussed above, seven companies who are members of the BAG already benefit from Global Gateway projects, as contracts have been already awarded to them, raising concerns that this advisory body opens the door even wider to corporate lobby influence, benefitting from development finance (see list in Annex 4).

In terms of sectoral coverage of the BAG members (see Figure 6), nearly one third of the companies are categorised as operating in climate and energy (19), followed by transport (14), health (13), and digital (9). Companies working in the education and research sector (4) are least represented in BAG. When compared to the sectoral coverage of the Global Gateway flagship projects, climate and energy is the dominant sector both in the BAG and the projects, followed by transport. However, digital is the third most covered sector across the flagship projects, rather than health.

Figure 6: Sectoral composition of BAG vs sectoral coverage of flagship projects[103]





Source: Authors' own.

The Global Gateway Civil Society and Local Authorities Advisory Platform [104] is supposed to assist the EC "in ensuring that Global Gateway as a values-based strategy contributes to sustainable investments, delivering on its goals in line with its principles."[105] It is composed of 57 members: 42 civil society networks and organisations, 4 social partners and professional and business associations, and 11 associations of local authorities.[106] The organisations listed in the CSOs section include one which describes itself as "an ecosystem of business leaders mainly active in the banking and finance industry,"[107] an organisation whose members include big tech giants such as Amazon, Google, and BAG member Nokia,[108] and an association representing the interests of motoring organisations and the governing body for Formula One.[109] Private sector and employer organisations are also members.[110]

The platform falls short of adequate engagement with civil society and local governments, increasing the democratic deficit of the Global Gateway in the absence of binding roles for parliaments in the Global South and Europe. According to the Africa Platform, a civil society member of the Platform,

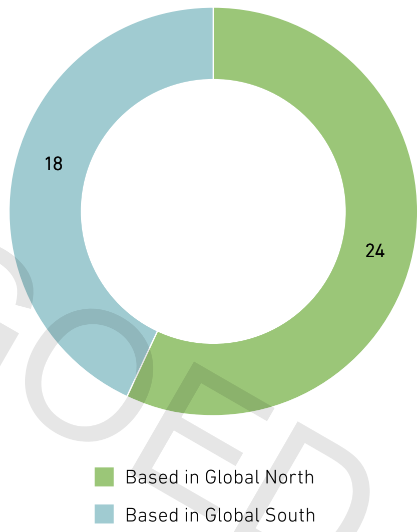
> **"the Commission appears to have assigned only a monitoring role for CSOs presuming they agree with the projects or their approach. And they have been reluctant to either engage civil society in identifying projects with clear development multiplier outcomes. What is even more frustrating is that the Commission is equally reluctant to provide details of how each of the projects were arrived at, or if they were indeed co-designed by partner states. In effect, civil society lacks power to influence the Global Gateway in itself and advocate for a rethinking of the entire Global Gateway approach to realign it with projects that meet partner countries' development demands."**[111]

Alliance 2015, another member of the Platform, states that it is:

> **"disappointed by the pace of activity perceived in Global Gateway rollout compared to the engagement with and activity in the platform", and it "calls for more transparency, and a much greater, inclusive and Sustainable Development Goals-driven consultation."**[112]

Figure 7 shows the location of the headquarters of the 42 civil society networks and organisations in the Platform (i.e. excluding local authority associations and social partners, professional and business associations). Out of the 42, 24 are headquartered in the Global North, including Europe and United States, while 18 are headquartered in the Global South. The latter includes international organisations like Oxfam and World Organization of the Scout Movement.[113]

Figure 7: Civil society organisations and networks according to headquarters



Source: Authors' own.

In parallel, the EU's recent calls for proposals place a burden on CSOs and their resources to monitor impacts of Global Gateway projects.[114] These projects task CSOs with ensuring that human rights protection, socio-economic impacts, and environmental conservation are integrated into the Global Gateway investments. However, this is not a solution to the inadequate governance framework of the Global Gateway.

In addition to the dedicated NDICI-GE CSO Thematic Programme,[115] the NDICI-GE Regulation states that Geographic Programmes[116] should aim at

> **“Supporting, strengthening and empowering a thriving civil society and its independent, active and multiple roles in political transitions, reform processes and democratic transformations, and promoting an open and enabling space for civil society and citizens’ engagement in political life and in scrutiny of decision-making as well as countering the shrinking of democratic space; supporting and promoting the participation of all in political processes and public life”.117**

It is essential for the CSOs to receive sufficient funding for these objectives, and it should not be reduced in order to finance CSOs’ activities linked to the Global Gateway projects. Also, while an active role for CSOs in the selection and subsequent implementation of development projects is needed, there is a risk of instrumentalisation of CSOs to serve private sector interests promoted under the Global Gateway.

1.4 Gender goals in the Global Gateway

Gender equality barely features in the Global Gateway Communication, being mentioned only twice and in vague terms.[118] This is contradictory to the level of ambition contained in the EU’s third Gender Action Plan (GAP III),[119] the EU’s framework for promoting gender equality and women’s empowerment through external action, which should apply also to the Global Gateway. In order to “promote a transformative and intersectional approach, and (…) mainstream gender in all policies and actions” and to “tackle all intersecting dimensions of discrimination, paying specific attention for example to women with disabilities, migrant women, and discrimination based on age or sexual orientation”,[120] GAP III commits to a target for 2025 that 85 per cent of the EU’s external actions will support gender equality and that at least one gender-targeted action will have been implemented in a recipient country.[121]

However, when EIB Global, the main Global Gateway implementer, set its gender equality targets, it committed to increasing its share of finance that supports the GAP aims from 23 per cent in 2022 to only 30 per cent in 2025, far below the target of 85 per cent.[122]

In practice, it is unclear whether the Global Gateway implements a progressive gender equality approach, addressing intersecting oppressions and systemic power sharing changes.[123] Further research is needed to assess how the projects can address challenges such as unequal gender impact on jobs, including factors such as informality of the sector or needed level of qualification.

For example, women are disproportionately impacted by the climate crisis and gender inequalities, in particular Indigenous women and girls facing extreme poverty and reliance on fragile ecosystems. The International Labour Organisation (ILO) stresses that in labour market changes due to climate change and mitigation and adaptation policies, women are likely to be at risk of being left out from the new jobs. According to the ILO, an intersectional approach to the transition towards a green economy with gender equality at the core is essential, including gender responsiveness ranging from macroeconomic policies, industrial and sectoral policies, and labour market policies to social protection, rights, and social dialogue.[124] In the view of Concord (European Confederation of NGOs working on sustainable development and international cooperation), gender issues should be given particular attention in sectors such as the green and digital infrastructure, sectors where a gender focus is the least present. An absence of concrete gender policies and rigorous data collection, including gender disaggregated data (which the Global Gateway does not offer), can risk perpetuating and exacerbating gender inequality.[125]

The EIB’s Strategy on Gender Equality and Women’s Economic Empowerment is largely focused on addressing gender inequality in the context of financial inclusion, but it also recognises more comprehensive gender issues such as the investment needed to reduce the problem of unpaid care work falling to women, the impacts of social constructs of masculinity, and the need to promote equal access to and equal utilisation of benefits generated by the bank’s investments.[126] However, the EIB relies largely on supporting its clients in their investments instead of having a concrete gender equality project portfolio[127]. Moreover, lending and procurement by the bank’s clients to third parties means that the EIB is even further removed from the final project design and implementation, so positive impacts of the bank’s investments risk being further limited and difficult to track.

1.5 Inequality in the Global Gateway

In June 2023, DG INTPA's Commissioner Urpilainen launched the Inequality Marker (I-Marker), as a "fundamental tool" to achieve the EC's "overarching objective of addressing inequalities by building inclusive and sustainable societies".[128] The EC provides two main reasons for implementing the I-Marker:

A. "to improve the design of interventions to reinforce their inequality-reducing effect," and

B. to create a "sound reporting and benchmarking system on the contribution of all relevant interventions (in terms of ODA allocation) to reducing inequalities, capturing appropriately the multidimensionality of Inequality."

The I-Marker is also focused on measuring how development interventions can better address the needs of the bottom (poorest) 40 per cent of the population and socio-economically disadvantaged individuals in partner countries.[129] The EC recommends the use of the I-Marker in conjunction with other analytical measures such as the analysis of inequality levels and drivers in partner countries as well as a tool for a Distributional Impact Assessment (DIA), which provides an assessment on the potential inequality-reducing effects of the intervention.

The EC's emphasis on development assistance as the EU's response to inequality reduction is a welcome step, especially since it aligns with the EU's mandate of being a provider of development assistance under the EFSD+. However, the efficacy of the I-Marker needs careful analysis. At least two key challenges can be highlighted.

First, as the EC notes, the I-Marker is designed not to assess the impact of development cooperation interventions but instead to assess "whether, and to what extent, inequality reduction is an objective of a donor's intervention and, therefore, how likely it will have an impact on reducing within country inequalities." This means that the tool is unable to measure how inequality has been impacted. It is an estimate of how Global Gateway projects can potentially lead to improvement in inequality measures. The fact that I-Marker cannot be linked to evidence-based results on the ground is a major limitation of this tool.

The contradictory goals of the EU Global Gateway, combining development goals with investor returns, means that infrastructure projects, for instance, could enhance access to public services such as through the construction of new roads; however, it is not clear how the I-Marker would measure the impact of the project in relation to its affordability and inclusivity. As the latest research on the Global Gateway's I-Marker by the CSO Concord shows, infrastructure projects have the potential to tackle inequalities but, if affordability is not ensured, these projects run the risk of leaving people further behind.[130] Moreover, the I-Marker does not sufficiently account for the qualitative, historical, and political economy factors associated with private finance which have been leading to the privatisation of public infrastructure in Global South countries.

Second, in November 2023, the Council recommended the "broadest application of the Inequality Marker, including in Team Europe Initiatives and with regard to the Global Gateway".[131] Yet, the EC is still working on applying the I-Marker to the EFSD+.[132] Considering the centrality of the EFSD+ to the Global Gateway (see chapter 1.2), the effective coverage of the Global Gateway by the I-Marker appears to be limited.

In July 2024, a year after the I-Marker's launch, the EC announced the first results,[133] claiming that:

- In 2023, 59 per cent of all new projects funded from the International Partnerships budget had a substantial focus on reducing inequality, with inequality reduction being either a significant or the main objective.
- 77 per cent of new projects in low-income countries had a substantial focus on reducing inequality. The percentage was 70 per cent in lower-middle-income countries and 69 per cent in upper-middle-income countries.
- From a regional perspective, 76 per cent of new projects in sub-Saharan Africa substantially contributed to inequality reduction. In Latin America and the Caribbean, 61 per cent of projects targeted inequality reduction, and in Asia and the Pacific, 59 per cent.

However, despite the publication of the 370 NDICI-GE Action Plans,[134] there is no easily accessible information on these results. This undermines the accountability and even the credibility of the tool.

1.6 The Global Gateway and the EU's development goals

To the extent of the information available, this report examines whether Global Gateway projects in energy, climate, extractive, digital, and health sectors contribute to the EU's development objectives. As an external development plan, the Global Gateway has to align with NDICI-GE Regulation 2021/947[135] and reflect the aims set out in Article 3.5 of the Treaty on European Union:

> **In its relations with the wider world, the Union shall uphold and promote its values and interests and contribute to the protection of its citizens. It shall contribute to peace, security, the sustainable development of the Earth, solidarity and mutual respect among peoples, free and fair trade, eradication of poverty and the protection of human rights, in particular the rights of the child, as well as to the strict observance and the development of international law, including respect for the principles of the United Nations Charter.**[136]

The NDICI-GE Regulation explicitly calls for the application of the aid effectiveness principles, in particular ownership of priorities by the partner country. The Regulation stresses that the primary objective of EU development cooperation policy is the reduction and eradication of poverty, which should be aligned with the bloc's external action objectives of fostering the sustainable economic, social, and environmental development of developing countries.[137]

The Regulation also sets out the mandate of the EFSD+, a key financing tool of the Global Gateway:

> **The EFSD+ shall in particular foster sustainable and inclusive economic, environmental and social development, transition into sustainable value-added economy and a stable investment environment. It shall also promote socio-economic and environmental resilience in partner countries with a particular focus on the eradication of poverty. The EFSD+ shall thus contribute to the reduction of socio-economic inequalities, sustainable and inclusive growth, climate change adaptation and mitigation, environmental protection and management, the creation of decent jobs on the basis of the core ILO labour standards, economic opportunities, skills and entrepreneurship, socio-economic sectors, including social enterprises and cooperatives, SMEs, sustainable connectivity, the support to vulnerable groups, the promotion of human rights, gender equality and the empowerment of women and young people, as well as addressing specific socio-economic root causes of irregular migration and root causes of forced displacement [...].**[138]

The following chapters look at the Global Gateway's approach and projects in energy, climate, extractive, digital, and health sectors to examine how this investment aligns with the EU's development objectives.

Woman carrying water in Uganda. © Shutterstock

2. Energy investments under the Global Gateway

The Global Gateway's objectives in energy investments are development of infrastructure in recipient countries for decarbonisation and a green transition, and at the same time diversification of the EU's own clean energy supply and promotion of market opportunities for the European private sector.

According to UNCTAD, over 730 million people globally – around 9.1 per cent of the world population – have no access to electricity. In sub-Saharan Africa, 600 million people (comprising around 53 per cent of the region's population) have no electricity access.[139] Affordable, sustainable energy investments are an essential component of development finance centred on meeting people's needs.

The Global Gateway's 110 flagship projects integrate energy and climate sectors in one category. The energy projects consist of renewable projects in solar, wind, hydrogen, and transmission lines, as well as hydropower, geothermal energy, and biogas. For instance, in Africa, the EU is set to provide EUR 3.4 billion in EU grants to support renewable energy, energy efficiency, the just transition, and the greening of local value chains, with an aim to mobilise EUR 15 billion from EU public institutions and private investors.[140]

2.1 Just Energy Transition Partnerships and private energy markets

Based on the available information, there is a wide range of initiatives and energy projects under the Global Gateway, going from support to Just Energy Transition Partnerships (JETPs) and energy production, including wind turbines, solar power (on- and off-grid), biogas, geothermal, and hydropower, to transmission infrastructure and production of hydrogen from renewable energy.

Several recurring issues can be observed regarding questionable positive and meaningful development impacts, as well as alignment with the development objectives in EU treaties and the NDICI Regulation. The available information for the examined climate and energy projects raises questions about whether they could meaningfully contribute to positive developmental impacts. This is concerning in the face of inconclusive evidence of the development additionality of involving private actors in the energy sector in countries in the Global South. As demonstrated by the cases examined in this report, there is a risk that projects and companies can be selected for EU financing that are geared more towards fulfilling the EU's strategic and commercial interests than towards meeting local affordable, sustainable, and inclusive energy access and development needs, as well as a risk of negative environmental and social impacts.

While private sector investments and economic activity in the energy sector can be part of a successful policy mix, our analysis of Global Gateway projects in the sector indicates that increasing private investment alone is not sufficient to tackle successfully the double challenge of universal access to energy and a green transition.

JETPs are a climate finance framework supported by world leaders and over 550 companies for a green transition in the Global South countries. They are based on efforts to mobilise investments from rich Global North countries and the private sector to help the Global South phase out coal and accelerate renewable energy deployment, as well as address the social consequences of a just energy transition on jobs and communities.[141]

The Global Gateway currently includes JETPs in Vietnam, Indonesia, Senegal, and South Africa. However, JETPs are not showing successful results so far, reflecting key issues with the approach of relying on mobilisation of private sector finance. Contrary to the promised resource mobilisation, the finance raised so far has been insufficient. There have even been media reports of countries with JETP projects continuing to keep fossil fuel energy plants operational.[142]

As JETPs are premised on private sector involvement in energy generation and distribution – a framework promoted by the World Bank and the IMF – they offer an appealing prospect to Global North countries. Unwilling to adequately fund the energy transition in the Global South exclusively with public money, they believe that private entities active in the energy sector, including many large European corporations, can fill the gap. Under this agenda, independent power producers (IPPs) – private sector energy providers – have emerged as key beneficiaries of the commodified energy market. In contrast, publicly owned energy producers and utilities have been forced to submit to energy market reform and effectively operate as private companies in the markets.[143] According to the Bretton Woods Project's analysis of the World Bank's own assessment, governments were stripped of their capacity to ensure affordable electricity provision as a public good, as it was deemed too financially burdensome amid obligations to repay debts.[144] Trade Unions for Energy

Who profits from the Global Gateway?

Train parking lot in Johannesburg, South Africa © Ingo Stiller/Unsplash

Democracy (TUED) describe JETPs as representing 'green structural adjustment programmes' built on reforms and private-sector-led energy expansion instead of a just energy transition. They are financed through conditional loans that exacerbate the countries' debt burdens, and demand a range of reforms favouring the privatisation agenda – largely benefitting foreign-owned enterprises.[145]

The EU's approach to external investments in the energy sector is also reflected in the report of the Africa–Europe High-Level Platform for Sustainable Energy Investments[146] – a public and private sector task force established in 2018 as an outcome of the EC's push for increased cooperation with the African Union in the face of growing investments from China as well as from countries like Brazil.[147] The report identifies liberalisation of the market as one of the objectives to support IPPs. Further goals include splitting up the power sector and breaking up publicly owned energy systems to allow more private sector opportunities with a view to generating private sector investment in renewable energies – for which public funds are necessary.[148] Such an approach contradicts development cooperation objectives to strengthen public institutions and bodies at national and sub-national levels, and to promote universal access to affordable, reliable, and sustainable energy, which appear in the NDICI Regulation.[149]

At the heart of a profit-driven just energy transition reliant on the corporate sector lies an inherent contradiction: many of the needed green investments are not commercially interesting. Private renewable energy projects are not offering quick attractive returns, and they require public guarantees to access finance in new markets and protect them from risk.

They also require certainties for capital investments through solutions such as Power Purchasing Agreements (PPAs) guaranteeing an above market price for the producers, which can be untransparent and lead to higher renewable energy prices. For example, at the Global Gateway Forum in 2023, the EIB signed an agreement with Bangladesh to provide EUR 350 million of finance for renewables.[150] This loan is backed by a EUR 45 million grant from the EU, and backed by an EFSD+ guarantee.[151] Local civil society has raised concerns over the untransparent use of these funds, diversion of the funds to fossil fuels, and risks of overblown prices. This is because the management of PPAs in Bangladesh have led to a situation where renewable energy costs in the country are the highest in the region.[152]

Investing in renewable energy is especially less attractive for private investors in low- and middle-income countries, due to higher interest rates and a more elevated risk perception by private investors, which increases the cost of capital. As a result, the EIB's climate finance, for example, was less able to attract sufficient private capital in these countries than in high income countries.[153] According to the International Energy Agency (IEA), investment in renewable energy has been stagnant in real terms since 2015.[154]

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Profits raised on the basis of a concentration of intellectual property rights is another consideration in examining the Global Gateway approach. While China and other Asian countries are leading manufacturers in the renewables sector, some of the EU states have a strong technological development capacity based on patents; Germany is a leading EU patent holder in key 'clean tech' areas – accounting for nearly 37 per cent.[155] The NDICI Regulation notes an objective to cooperate in the area of technology in order to address poverty-related and societal changes. Technology transfer does figure prominently across the Global Gateway projects. In this context, the economic value present in Global South countries embraced by the Global Gateway risks turning them into consumers of European 'clean' technologies.

A just energy transition needs to be built not on profit opportunities, but around expanding access to affordable renewable energy, growth of fair and quality jobs, clean economic transformation, and necessary technology and knowledge transfer. In this context, it is questionable whether the Global Gateway's approach will contribute to these objectives.[156] To ensure access to affordable renewable energy and a just energy transition, TUED and Common Wealth are two of many CSOs who advocate for the public ownership and control of the energy sector – as cheaper and more efficient solutions – to ensure just and equitable access to affordable and sustainable energy for all.[157]

2.2 Energy production and distribution investments

Overall, most investment in the electricity supply chain concentrates on utility-scale infrastructure, with generation attracting around 2/3 of investment, 1/10 for transmission networks, and the remainder for distribution.[158] Within this chain, European companies benefit from engineering, procurement, and construction contracts and PPAs. Many renewable projects of the Global Gateway are proposed in the form of Public-Private Partnerships – such as solar power plants in Benin or the Ivory Coast[159] – and reflect the Global Gateway's approach of creating opportunities to tap into EU companies' competitive advantages.

In Africa, privately financed IPPs are the fastest growing investors in generation capacity.[160] For example, a contract in the Global Gateway project to build Niger's largest photovoltaic solar power plant, Gourou-Banda, went to a consortium of French companies, backed by a loan from the French Development Agency (AFD) and the State of Niger, as well as an EU grant.[161] Niger's President at the time, Mohamed Bazoum, inaugurated the plant together with the EU's High Representative/Vice President Josep Borrell.[162] The project was delayed by the coup deposing the president, amid protests against France's neocolonial influence, and by most of the technical staff reportedly leaving the country.[163,164] Another project in Niger developed by a French company, a solar/diesel hybrid power plant construction, was also cancelled due to the coup.[165] Approval of a project which includes diesel generators in the new power plant is also concerning from an environmental perspective, departing from the call from CSOs across the world and experts to shift away from fossil fuel energy systems and accelerate a just and equitable energy transition based on 100 per cent renewable power.[166] These examples of projects enabling investments by companies from the EU's largest economies in countries with historical colonial links (as well as instability featuring these grievances) expose the risk that the Global Gateway reinforces neocolonial patterns.

To integrate the renewable capacity into the electricity grid, energy storage and transmission projects come into play: for example under a Global Gateway project in Cabo Verde, the EIB (backed by EFSD+ guarantee) will fund expansion of a wind power PPP and installation of battery energy storage systems through the asset management arm of a Danish transportation and logistics firm, A.P. Moller Group.[167] Cabo Verde has recently introduced policies and incentives like corporate tax credits and property tax benefits to facilitate renewables investments.[168] Transmission projects face complex technical challenges, low returns, and lack of secure profit guarantees, resulting in slow development of the technologies needed.[169] A decline in financing for transmission and distribution reflects the declining power of public utilities and pressures of neoliberal reforms favouring private market solutions.[170] In effect, public funds are used to finance infrastructure beneficial to private developers that they themselves are unwilling to invest in.

For example, the EIB signed a Global Gateway-labelled agreement with Argentina to provide a framework loan of EUR 100 million backed by an EFSD+ guarantee to expand transmission lines across the country with a capacity to integrate renewables, with recognised significant environmental and social risks and impacts.[171] At the same time, European companies like Total, Enel, and Acciona have already invested in large-scale renewable projects in the country,[172] but they are obstructed by the limited transport capacity of the current grid. Instead of contributing to such investments, Enel decided to leave the country, pursuing other markets in Latin America with more growth potential, namely Brazil, Chile, and Colombia.[173]

Moreover, construction of vast transmission lines can entail risks of rights violations, but development banks like the EIB that finance such investments still do not have sufficient due diligence, assessment and transparency standards, and an effective and independent complaints mechanism to protect human rights and adequately address any violations.[174] The EIB's human rights policy and environmental disclosure standards fall behind other leading public development banks.[175] To make sure that European development finance is truly promoting human rights and sustainable climate investments, these gaps must be closed.

Off-grid energy is also financed under the Global Gateway for areas that are hard to connect to transmission grids. But the private ownership model with a clear profit motive raises many issues. In Nigeria, the EIB finances photovoltaic-hybrid mini-grids[176] constructed by Husk Power Systems, an American company.[177] Mini-grids are not commercially very attractive; they rely on subsidies and pose high costs in exchange for very low electricity consumption by the rural communities they address. To generate profits, mini-grid operators developed a model based on increased electricity consumption. Husk came up with a new solution to slow and low returns: an e-commerce platform selling energy-efficient devices to boost more electricity use, via a specific mobile application developed for collection of digital payments from customers for the electricity. People usually take on credit for such purchases, which are advertised through projects financed by European taxpayers.[178] This creates concerns related to the risks of creating overindebtedness of low-income households, which need to be properly assessed.

2.3 Hydrogen

The Global Gateway is also rich in renewables-based hydrogen projects, which can be distinguished between infrastructure and production projects, and regulatory frameworks. Importing hydrogen to the EU appears as an explicit objective in those plans. While current renewable hydrogen production globally remains negligible, the EU's hydrogen targets are overestimated, including import potential.[179] Current EU targets require more than all of the electricity that was consumed in France or in Germany in 2022.[180]

The EU's hydrogen import plans seem to be driven by interests in market opportunities of the fossil fuel industry and lobby groups such as Hydrogen Europe, who are also members of the Global Gateway Business Advisory Group.[181] In contrast to these plans requiring major public investment, European industry is already stressing that hydrogen is too expensive to use for decarbonisation.[182] Therefore, the hydrogen industry development risks being in a price race to the bottom for Global South exporters, at the expense of a just transition (see Box 6).

Box 6: The hydrogen myth

The hype around hydrogen risks increasing reliance on fossil gas. While small quantities of truly renewable hydrogen may be suitable for local heat and electricity generation or for a limited scope of industrial activities that are difficult to decarbonise, they will represent only a fraction of the current fossil gas consumption. So far, renewables-based hydrogen production has been minimal. According to Corporate Europe Observatory, in 2022 less than 0.1 per cent of global hydrogen was produced from renewable electricity. It remains an expensive, inefficient, and energy-intensive solution, supporting a centralised fossil fuel-based energy model to the benefit of a handful of large companies.[183]

At the same time, hydrogen projects risk encroaching upon local affordable renewable energy availability and risk having negative human-rights, social, and environmental impacts due to a large resource demand, such as land, renewable energy, or water. Greenwashing is also a risk in 'hydrogen-ready' infrastructure investments as there are various types of hydrogen, including those based on nuclear or fossil gas.[184]

Moreover, hydrogen projects reflect neocolonial patterns as they entail risks of corporate land, energy, and water appropriation, which can have environmentally and socially damaging impacts and offer little to no social benefits.[185] It is concerning that under the Global Gateway, 4 out of 13 water-intensive hydrogen projects are planned in countries with high water stress, 3 of those being where the water stress is extremely high – Namibia, Chile, and South Africa.[186]

The Global Gateway's rush for hydrogen extraction has also influenced international financial institutions like the IMF and the World Bank to accelerate the push for privatisation in countries like Morocco and enhance the legal and regulatory framework for EU market compatibility.[187] According to Shereen Talaat of Morocco-based CSO MENAFem Movement for Economic, Development and Ecological Justice:

> **"The emphasis on green hydrogen projects, influenced by (...) the EU Global Gateway, raises fears of exploitation and the creation of sacrifice zones. There is apprehension that our renewable energy resources might be used for the benefit of the Global North, echoing historical patterns of resource extraction and colonisation that prioritise profit over our citizens' needs."**[188]

This concern is pertinent as hydrogen projects offer investment opportunities for European companies benefitting from the land, resources, and infrastructure facilitated by a Moroccan state company.[189] In Egypt, hydrogen supply, which is of interest to Europe, is supported through the production of green methanol for shipping, which will most likely fuel ships operating in a maritime green corridor that may carry ammonia or hydrogen. Yet, green methanol is expensive, toxic, dangerous, and unproven as efficient fuel for shipping. Hydrogen transport via ships is also highly energy intensive and incurs losses.[190]

In conjunction with their exploitative impact, there are significant doubts about the ability of such projects to ever succeed, particularly in countries like Namibia where little infrastructure exists to facilitate hydrogen industry expansion and thus requires much larger investments.[191] The EIB has been hesitant to approve finance for a German company Hyphen, stressing that the project is still not showing bankability, i.e. not profitable enough.[192] Other concerns include whether well-paid and high-skilled jobs can be secured for the local population.[193]

In effect, there is a high risk of spending public money on corporate profit and false development promises to the Global South based on an unproven industry with damaging impacts, diverting resources from sustainable energy solutions essential to development.[194]

Chile is one of the countries of major interest under the Global Gateway. The EU recently approved the EU–Chile Advanced Framework Agreement focusing on trade and investment liberalisation and covering sectors such as hydrogen as well as raw materials.[195] The EC's own assessment of this agreement highlights contradictory impacts of development and trade policies: skilled jobs in 24 out of 31 sectors are expected to decline as a result of the deal, most of them in manufacturing.[196] The agreement came under fire from over 100 European CSOs for its "unsustainable and unjust modes of production and exchange, set out to reinforce neocolonial terms of trade".[197] Chile's civil society has criticised the agreement for turning Chile into a colony providing the EU with hydrogen and lithium.[198]

As a part of the EU–Latin America and the Caribbean Global Gateway Investment Agenda, the EIB and KfW committed to invest EUR 100 million each in hydrogen infrastructure and manufacturing in Chile, as well as in 'hydrogen-consuming assets', backed up by EUR 16.5 million from the EU–Latin America and Caribbean Investment Facility.[199] But hydrogen projects in Chile have met criticism from civil society and Indigenous people who have been fighting to protect the 'sacrifice zones', areas with populations, ecosystems, water resources, and local economies heavily impacted by mining and industry, and now by big 'green' infrastructure projects like hydrogen.[200] It is also important to note that hydrogen can be used for decarbonising Chile's mining sector[201] – an objective explicitly referred to in Team Europe Initiative[202] – and Chile's objective to become one of the top three biggest and cheapest exporters of green hydrogen by 2040 stands in contrast to responding to local affordable renewable energy needs, given that more than 70 per cent of the energy consumption in the country still comes from fossil fuels.[203]

An important component of the Global Gateway is a reform and policy influence agenda. Hydrogen is a key focus in the EU–Africa Global Gateway Investment Package – Green Energy Initiative, which includes as one of its objectives support for reforms and the creation of a 'conducive regulatory environment' for private investments, financing through grants the leveraging of further investments in hydrogen.[204] This is done through joint agreements, roadmaps and legal frameworks, an enabling business environment, regulatory alignment, and other terms used to describe the EU's influence on the countries' ability to accommodate European investments – such as in Kenya, Mauritania, Namibia, Uruguay, and Argentina.

2.4 Biogas, geothermal energy, and hydropower

Global Gateway energy projects also include biogas, geothermal energy, or hydropower dams – some of them with a particularly negative local human rights and health impact.

In Kenya, a Global Gateway project sets out modernisation of the Olkaria geothermal power plant by the Kenyan state-owned KenGen. The track record of KenGen is problematic: the initial plant construction it was responsible for led to a forced resettlement of thousands of Indigenous people as well as other marginalised groups, and caused many negative health impacts for people and livestock.[205] Regardless, KenGen was also chosen to carry out drilling in Ethiopia for a Global Gateway project of a French subsidiary aimed at developing the country's first geothermal independent power producer.[206]

The Climate Fund Managers (CFM)-funded Bio2Watt plant in South Africa is a 'waste to value project' treating animal waste and other waste sources to produce biogas. Development additionality is not clear as the project will supply a plant where German car company BMW operates in South Africa, and had, according to a press release,[207] also signed an agreement to supply a subsidiary of the Belgian-Brazilian brewery group AB InBev.[208] Moreover, the environmental impacts of the project are unclear. According to Climate Action Network (CAN) Europe, there are concerns about the sustainability of some biogas production, which should be addressed by considering only waste and residues with no alternative and lower emission use as potential sources.[209] An assessment of such alternatives should be carried out for the project.

For hydropower, a Global Gateway project to build the Ruzizi III dam has been designed as the first regional PPP involving a private sector consortium and the governments of DRC, Rwanda, and Burundi. It should supply energy under long-term PPAs to utility companies distributing electricity. The Ruzizi III project already raises some concerns: it was initiated as far back as 2009, its development has been very slow, and Ruzizi III international private sector investors have been derisked through development finance despite the project conclusion not being in sight. Moreover, the project risks having negative socio-economic effects, triggering resettlements and directly impacting at least 4,500 people in Rwanda and in the DRC, as well as land, crops, fruit trees, and various other plants.[210]

Olkaria geothermal plant, Kenya © Frank Van Der Vleuten/ Flickr

3. Climate finance under the Global Gateway

The Global Gateway's climate investments include nature-based solutions, forestry support, climate-smart technologies, bioeconomy, waste treatment, water supply, and agriculture. Investments are mostly concentrated in mitigation – focusing on reduction of emissions through renewable technologies – but are also directed to the preservation of so-called 'carbon sinks' such as the Amazon rainforest in Latin America, waste management, water desalination, or energy-efficient housing.

The Global Gateway reflects a broader issue in climate finance: while highly concessional adaptation finance is essential, it remains underfinanced.[211] Adaptation finance – that is investments which support adjusting to the consequences of climate change, such as sea-level rise, extreme weather events, and changing crop growing seasons – is not significantly targeted by the Global Gateway. This highlights the problems of the private finance-oriented development approach of the EU and the Global North: leaving out funding for needed interventions that might not be profitable, ignoring the responsibility of rich countries and large companies for historical emissions driving the climate change, and not delivering on the promises to mobilise climate finance.[212]

Climate projects financed under the Global Gateway reflect the EU's approach focusing on interventions that offer market opportunities. However, as projects such as nature conservation and restoration rarely offer attractive profits by default, the role of development finance turns into creating profitable climate action opportunities. Indeed, climate activists have criticised the current climate finance approach of the Global North as failing to take responsibility for climate damage, and instead maximising profits from climate loans – an approach far from climate justice.[213]

3.1 Waste management and wastewater treatment

Waste management is another service sector where private sector investments are supported under the Global Gateway. For instance, the Spanish government, Inter-American Development Bank, and Japan International Cooperation Agency have offered loans for a solid waste management programme in the Dominican Republic, for which a Finnish company proposed a combustion plant solution turning landfill waste into energy, which can be relocated after the waste is used up.[214] The project includes the closure of the current La Duquesa landfill in Santo Domingo, and a plant to turn waste into raw materials and energy.

While tackling landfill is undoubtedly a positive development due to its environmental impacts, private profit-oriented waste-to-energy projects have been linked to inefficiencies in studies, highlighting the importance of a comprehensive waste management system as a public service not dependent on returns.[215] A Dominican trash scavenger organisation has been actively trying to protect the informal workers collecting waste at the site for decades from the closure's negative impacts, stressing the need to not "just solve the environmental problem and create another one". Based on previous assessment of privatised public services, there is a risk that a private sector entity would not effectively address the social or human rights impacts of the landfill's closure arising from its project.[216] In turn, companies can profit from development finance and let local public authorities deal with negative consequences, while weakening accountability and public capacity to provide affordable and sustainable public services.[217]

As a result of using development finance to create profitable investment opportunities, public services can also become financialised by asset managers. In Senegal, the Global Gateway construction of an urban and industrial wastewater treatment plant along the Hann Bay was awarded to SUEZ – a French utility company born out of Engie – and a Senegalese consortium. One of the largest shareholders of SUEZ is Meridiam, an asset management company based in Paris and a member of the Global Gateway Business Advisory Group.

Risks of profit-driven projects can be illustrated by a case where a utilities consortium formed by Engie, Meridiam, and other partners is now suing a public university in the US for its unwillingness to pay fees, which the university claims are inaccurate and should not be extracted at a profit margin.[218]

Taghit, Algeria © Halima Bouchouicha/Unsplash

3.2 Nature-based solutions and debt for nature/climate swaps

Concepts like the so-called nature-based solutions or debt for nature/climate swaps also appear on the Global Gateway list. This is a mechanism whereby part of a country's debt is restructured on condition that the saved money is used for climate measures or nature protection.

For example, the EIB intends to support a debt-for-climate swap project in Barbados to upgrade a sewage treatment plant.[219] The savings from the debt swap seem to benefit a Canadian entity developing the project.[220] According to the EIB President at the time, debt-for-climate swaps – what is intended to become the world's first financing structure of its kind – can create fiscal space for essential investments.[221] However, even large institutions like the IMF recognised that debt-for-climate swaps offer less efficient fiscal support than grants and/or debt restructuring. They are slow, complex, and costly, and they provide no substantial debt reduction and fiscal space for much-needed climate and development investments.[222]

Nature-based solutions also often include offsetting mechanisms and carbon credits. They feature in the Global Gateway's support to the Great Green Wall project, an initiative of the African Union dating back to 2007 which seeks to re-green Africa in the Sahel and the Sahara by planting trees over 8,000 km of land belt, restore 100 million hectares of degraded land, sequester 250 million tonnes of carbon, create 10 million green jobs by 2030, and expand investment opportunities.[223] The initiative has been criticised by scholars for its faulty scientific and economic assumptions about tree planting projects, marginalising the complexity of nature restoration, for privatisation of public lands, and for curbing pastoral mobility.[224] The top-down technical and territorial approach of such projects reflects the political interests and concerns of national governments and international donors – such as maintaining political stability, security, or migration – as well as economic interests to turn afforestation into a revenue stream, while little information is available about their achievements and social impacts.[225] International donors are prioritising countries in the area that have higher levels of stability and leaving out countries like Chad, Mali, or Sudan with instability, insurgencies, displacement, and poverty. The funding and implementation of the project has been slow, further calling into question the donors' commitment to the overall goals of the initiative.[226] The project also entails a proposal to offer carbon credits,[227] despite research pointing at its unsuitability in addressing climate change and social needs, untransparency, greenwashing, and risk of land grabs, as well as recreation of colonial patterns of land appropriation to greenlight pollution by the rich countries and their enterprises.[228]

3.3 Housing

Sustainable housing is also included in climate finance under the Global Gateway, but it is unclear how current flagship projects in this sector contribute to poverty eradication and inequality reduction as set out in the NDICI regulation.

For example, the Global Gateway Fondo MiVivienda project in Peru on sustainable social urban housing, financed with a grant from the Latin American Investment facility and loans from KfW and AFD, uses public funds to encourage low- and middle-income households to take on mortgages for 'green' properties.[229] The project aims to help lower interest rates on mortgages. Intermediated financing for housing mortgages under the Global Gateway exists also in Chile.[230] It is questionable whether low-income households can benefit from such a programme which requires possession of substantial capital in the first place as a down payment to buy a property, while the gender equality impacts would also need careful consideration. It is not clear if their inclusion was evaluated among the impacts of the project.[231] While the Fondo MiVivienda project aims to help lower interest rates on mortgages, it should be carefully examined and ensured that such financing frameworks do not lead to individual indebtedness, especially where public finance is used to protect the lender and not the households in case of non-payment.

Solar panel installed in red roof on a house in the mountains of Peru.

Debt-for-climate swaps offer less efficient fiscal support than grants and/or debt restructuring. They are slow, complex, and costly, and they provide no substantial debt reduction and fiscal space for much needed climate and development investments.

4. Raw materials partnerships under the Global Gateway

The EU's raw material partnerships are an important component of the Global Gateway investments in the climate and energy sector. Some raw material partnerships consist of the EU's investment in raw material value chains in various countries, mostly in the Global South.[232] These investments in host countries are informed by the EC's Critical Raw Materials Act (CRMA),[233] which entered into force on 23 May 2024, after approval by the European Parliament and the EU Council.[234]

To analyse the design, nature, and impact of the Global Gateway's investment in critical raw materials, it is essential to focus on the main details of the CRMA and how it equips the Gateway to prioritise EU commercial interests at the expense of the EU's development cooperation objectives.

The CRMA's main objective is to ensure the EU's access to a secure and sustainable supply of raw materials it deems critical for its digital and green transitions. This strategy aims to diversify the EU's raw material value chain and reduce import dependency. The CRMA establishes that the EU should enhance its use of geological resources to produce at least 10 per cent of its strategic raw materials (SRM)[235] consumption, expand its processing capacity to produce at least 40 per cent of its annual SRM consumption, and increase recycling capabilities to account for a minimum of 25 per cent of its annual SRM consumption.

In addition, no more than 65 per cent of any strategic raw material at any relevant stage of processing can originate in a single third country.[236]

To achieve this goal, as of July 2024, the EC has established strategic partnerships on critical raw materials with Argentina, Australia, Canada, Chile, the DRC, Greenland, Kazakhstan, Namibia, Norway, Rwanda, Serbia, Ukraine, Uzbekistan, and Zambia.[237]

The CRMA has raised several concerns about its impact on the public interest, both in the EU and in the Global South. As highlighted by Friends of the Earth Europe, the CRMA is heavily influenced by lobbying from mining companies and metals- and minerals-using companies, skewing a key public interest area in favour of the EU private sector.[238] In addition, there has been a lack of meaningful rights holder engagement in the negotiations around these partnerships and, although the agreements are public available,[239] there has been very limited access to the content of the so-called roadmaps and projects, in producer countries.

The 'Strategic Projects'[240] concept – which can include non-EU countries where potential mutual benefit exists, risks enabling projects to become approved without sufficient human rights and environmental safeguards. Despite all efforts by Counter Balance, Oxfam, and their allies,[241] no provision of the right to Free Prior and Informed Consent for communities that could be affected by the projects was included in the final text of the CRMA. All the while, the CRMA is not designed to address the problem of the EU's unsustainable consumption patterns which require major imports – to be met through resources including development finance. In general, the instrumentalisation of the Global Gateway for the CRMA shifts power relations in favour of project promoters and private sector interests while sidelining the necessary control over public decision-making and accountability.[242]

4.1 The Lobito Corridor

To illustrate the EU's interest in creating 'highways for critical minerals' to secure its demand, it is worth zooming in on the Lobito Corridor – an infrastructure corridor now supported by the Global Gateway connecting the DRC, Angola, and Zambia. The Lobito Corridor links with the mining areas of Katanga province in the DRC, which is home to more than 50 per cent of the world's cobalt reserves, while also passing the Copperbelt region in Zambia.[243] International mining companies dominate these resource-rich regions. Historically, this corridor was known as one of the busiest transportation routes in southern and central African regions.[244]

Regional efforts to revive the Lobito Corridor produced limited results.[245] However, the project was resuscitated in late 2023 under the United States (US) Partnership for Global Infrastructure and Investment (PGII) initiative, a G7 initiative. The project, conceived in the context of responding to China's Belt and Road investments in Africa (which currently dominates infrastructure supply chains of critical raw materials[246]), aims to mobilise USD 600 billion in loans and grants for accelerating infrastructure projects in Global South economies and mobilising the private sector for this purpose. The corridor consists of a railway connection between Angola, the DRC, and Zambia mainly to secure good access to the raw materials.[247]

Under the auspices of the PGII initiative, the corridor is being upgraded and developed by the governments of Angola, Zambia, and the DRC with support from the US and institutions like the Africa Finance Corporation and Africa Development Bank.[248] The EU has signed a Memorandum of Understanding (MoU) on the Lobito Corridor with the DRC and Zambia in cooperation with the US and other partners. In addition, the EU has also signed bilateral MoUs with DRC and Zambia on raw material value chains.[249]

The stated areas of cooperation between the US and EU in the corridor include transport infrastructure investments, measures to facilitate trade, economic development, and transit, and support to related sectors to fuel economic growth and capital investment in Angola, Zambia, and the DRC.[250] G7 partners also signed an MoU with the corridor partners during the first Global Gateway (GG) Forum in October 2023.[251] Prominent investors with concessions to develop the corridor include Trafigura, Mota-Engil, and Vecturis.

Railway station in Lubumbashi, Democratic Republic of the Congo © BBC World Service/Flick

According to media sources, US government officials estimate that the project will cost more than USD 1 billion (EUR 1 billion).[252] However, a breakdown of the actual costs is not publicly available to determine the amount of concessional financing committed by donors including the EU, the contribution by the governments of Zambia, the DRC, and Angola, and the amount of private finance to be mobilised.

While it is too early to examine the potential developmental impact of the Lobito project, it is clear that Global Gateway's strategic partnerships, built on the problematic CRMA, prioritise the geopolitical and commercial interests of EU investors, while the benefits for host countries are not clear. This is evident in the fact that the GG's involvement in the Lobito Corridor is rooted in the EU's broader partnership with the G7's PGII infrastructure initiative. Its investment approach is based on bringing projects to G7-based investors and commercial partners such as the CitiGroup,[253] rather than fostering local value and sustainable development for the host countries.

As previous examples of private finance in international development show, the ambition to mobilise adequate and appropriate private finance beyond promises remains a challenge. It is still not clear how the project will continue to ensure that private investors come in and that investing models are cost-effective for Global South countries.[254] Privatised infrastructure models which compel Global South citizens and governments to pay expensive user fees appear to offer not a development investment but rather an extractive rent. The EU's support of such initiatives must be accompanied by a publicly accessible analysis of adequate development impacts and costs for Global South citizens, and must be put to scrutiny by EU citizens.

4.2 Development impacts and conflict sensitivity

The developmental impact of critical raw material projects under the Global Gateway is also not clearly established. The evidence of such projects promoting a values-based sustainable development agenda for Global South countries remains to be seen. The extractive nature of investment associated with critical raw material projects is also grounds for concern especially in relation to the impact on Indigenous and local communities based in mineral-rich areas. This is evident in contexts where historically the pursuit of raw materials has caused or exacerbated regional conflicts as well as gross human rights violations and the devastation of the environment.[255]

Of particular concern are the agreements signed by the EU and the EIB with Rwanda on 'Sustainable Raw Materials Value Chains',[256] in the framework of the Global Gateway. Congolese civil society group Lucha has called for a cancellation of the EU's agreement with Rwanda due to the link between the raw materials trade and well-known human rights violations destabilising the mineral-rich North Kivu region, where Rwanda is accused of backing the M23 armed group and which has been the site for historical resource conflict in the region.[257] Yet, the EU has been providing support to the continued deployment of Rwanda Defence Force in Cabo Delgado province (Mozambique).[258] The DRC's President Felix Tshisekedi called the new partnership a proxy war.[259] On top of this, Lucha activists have faced arrests for their protests against the armed group.[260]

5. Digital transformation under the Global Gateway

Digital transformation is one of the key pillars and areas of cooperation and investment under the Global Gateway, comprising 13 per cent of the total projects in 2023 and 2024. It reflects the EU's increasing ambition to strengthen its role as a digital actor in the climate of global competition. These projects cover investments in physical digital infrastructure – particularly fibre optic cables, 5G, or data centres – as well as digital cooperation to expand business opportunities arising from digitalisation, and data governance through exchanges to strengthen policy and regulatory frameworks.

The connectivity agenda of the Global Gateway reflects the contradictory nature of the objectives reflected in this approach across all investment areas: addressing poverty, inequality, services, and development through promoting European technology, digital services, and other private sector investments in the Global South as the solutions to these challenges. According to the NDICI-GE Regulation, the EU cooperation actions should promote accessible, affordable, inclusive, reliable, and secure digital connectivity, as well as the use of digital technologies as an enabler for sustainable development. However, there are serious doubts over the extent to which these aims are guiding Global Gateway investments.

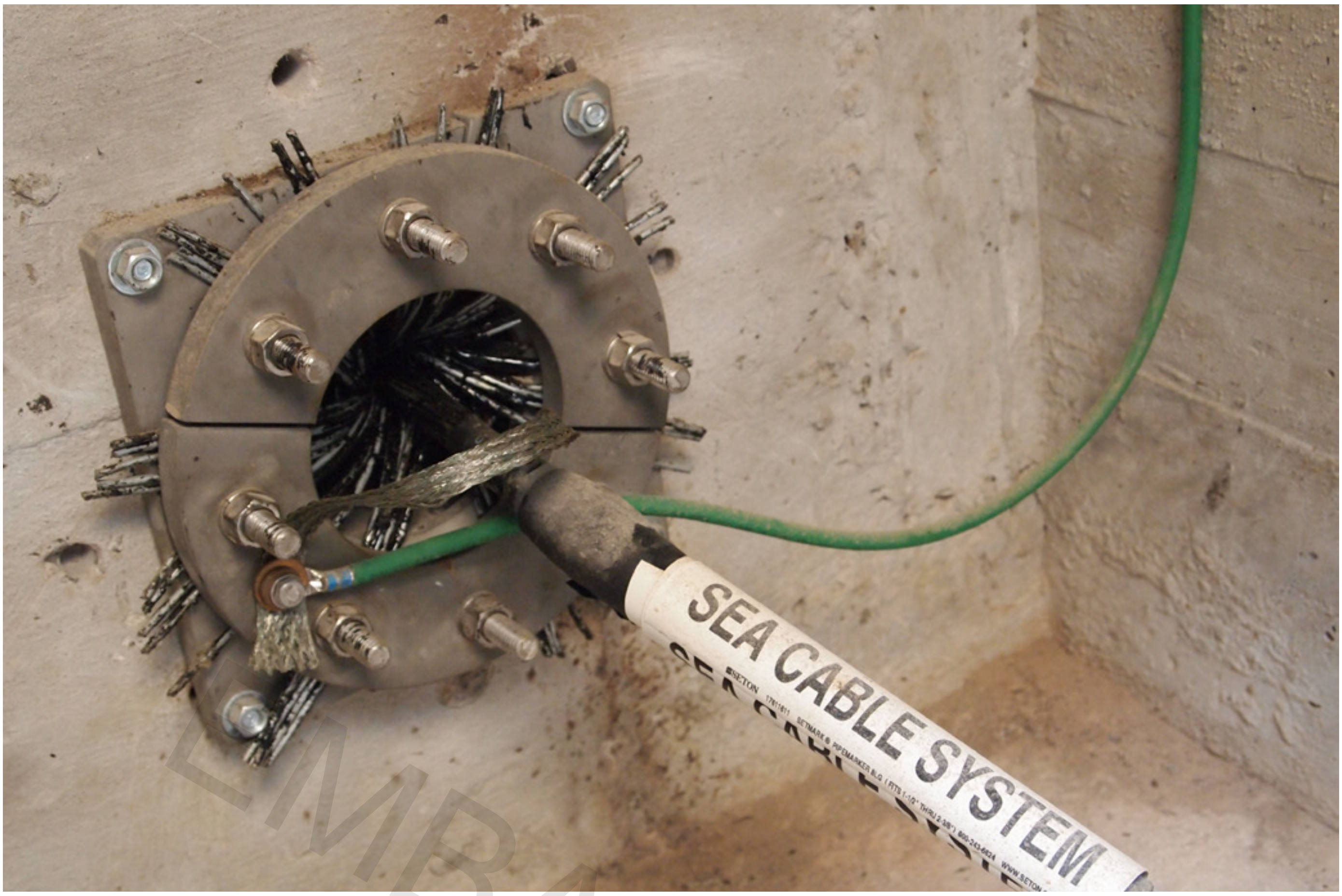
Geopolitical interests, and access to data and markets for EU businesses, are leading considerations for the bloc to secure a stronger position in the face of the dominating role of the US and China in the digital economy and international technical standards[261] – namely the US' Big Tech companies, such as Google and Amazon, and China's Huawei.[262]

Moreover, as connectivity provides significant economic and geopolitical power to owners of the infrastructure, they are an increasingly important strategic and diplomatic tool in foreign policy.[263] Global Gateway investments in 5G reflect such EU interests, addressing the dominance of China in Latin American, African, and Asian markets.[264] Yet, such investments in a development context raises a number of questions and concerns. For instance, reports show 5G is more likely to be installed in wealthier cities rather than in poorer or rural areas, which risks exacerbating inequality.[265]

5.1 Subsea cables

The geopolitical motivations of this approach are reflected in the investments in submarine cables that connect countries to the Internet, and allow for expanded growth of telecommunications networks. Service providers buy access to the cables at wholesale prices, which they sell to the end-users.[266] The significant ownership of submarine cables by private actors can result in a situation of dependency when private sector interests do not align with state interests.[267] Emerging reports of untransparent and unclear decision-making with regard to the selection of the EU's connectivity investments, influenced by lobbying, give increasing grounds to such concerns.[268] Moreover, many countries and rural areas remain underserved or disconnected,[269] and subsea cables are not going to reach the vulnerable and marginalised communities without investment in further infrastructure.[270]

Subsea cables are rolled out with the participation of large and rich EU telecom players, like Orange or Nokia's Alcatel (members of the Global Gateway Business Advisory Group) who are taking part in the Global Gateway Medusa submarine cable project in the Mediterranean Sea to connect Europe with African countries to create "unprecedented opportunities for collaboration, innovation and economic development".[271] While the publicity of the project by the EC promotes connecting universities and research centres in Europe and Africa as one of its aims, the implementation and outcomes of this are not clear from the project design and proposal.[272] Combined with lack of access to data, not allowing for monitoring or evaluation of the Global Gateway investments, its contribution to key NDICI-GE objectives to support poverty eradication or inequality reduction remains uncertain. What is clear is that private companies in the communications sector will benefit from the opportunity to further export connectivity services.[273] Despite the importance of subsea cables for connectivity – and of diversified providers to mitigate geopolitical dependencies and security risks – the Global Gateway reflects an overall issue with there being an absence of public scrutiny of their regulation, construction, and planning.[274]



Subsea cable in East Africa © Jon Evans/Flickr

5.2 Digital trade

The Global Gateway highlights the EU's digital agenda, promoting a digital market and a global normative framework of values-based, human-centric digitalisation as the bloc's investment offer to counter its competitors.[275] Regulatory cooperation and harmonisation is also advanced through a transatlantic partnership with the US,[276] and follows the approach of institutions such as the World Bank.[277]

In this context, the EU's trade agreements in the digital sector serve as an important tool to reduce or eliminate barriers to the EU's digital trade – commerce enabled by electronic means such as telecommunications and/or Information and Communications Technology (ICT) services, covering trade in both goods and services in all sectors of the economy. Indeed, the Digital Connectivity Masterplan for the Global Gateway developed by the Centre for European Policy Studies (CEPS) and the EC highlights that the Global Gateway objectives can be leveraged in bilateral partnerships and through digital diplomacy to promote the EU's model of digital governance in the world.[278] Furthermore, BusinessEurope – the most active and powerful lobby group in the EU institutions[279] – envisions that the Global Gateway's digital projects, focusing on regulatory frameworks, will serve as a vehicle for advancing the EU's digital trade and incentivise private investments in digital infrastructure.[280] Examples of such Global Gateway projects include market regulation in Brazil to promote international outreach of the EU Digital Single Market regarding technologies, regulation, and standards.[281] It is important to stress that many similar initiatives exist which are not labelled as Global Gateway projects. The selected flagship projects therefore serve as a useful tool to examine the direction of EU aid and development finance.

Several issues emerge when looking at the financing of the EU's connectivity and digital trade agenda with development funds. Research about the EU's Free Trade Agreements (FTAs) in digital trade by the Transnational Institute (TNI) concluded that clauses attached to EU trade agreements with Global South countries "will hinder digital industrialisation, restrict necessary state oversight of corporations and undermine citizens' rights elsewhere, in particular in developing countries".[282] The research also highlights that the EU digital trade agenda is inclined towards extractivism because it does not pay the countries for mining raw material (data) and at the same time prevents them from their own technological development – which the authors call "digital colonialism".

The EU's ambitions to secure data access globally as an essential resource for economic growth, competitiveness, and innovation are outlined in the European strategy for data. It emphasises the business opportunities that data offers, including those in the public sector, and suggests the use of the EU's data regulatory and policy framework to attract the storage and processing of data globally.[283] To this end, the Global Gateway projects feature development of an EU–Africa innovation and start-up ecosystem,[284] or data centres and subsea cables.

For instance, a project in Mauritania includes a data centre in Nouakchott and the extension of an existing subsea cable between Europe and South America to the country, financed by the EIB.[285] A contract to build the cable was awarded to Ireland-based company EllaLink Ireland Ltd, which won the tender over a Senegalese company and a Mauritanian consortium.[286] The cable's connected landing spot is the ZILS Industrial Zone, in the region of Portugal's Port of Sines. Sines is also the site of a major data centre. EllaLink cooperates with other companies to encourage a landing ecosystem for international subsea cables by offering pre-permitted infrastructure.[287] However, the Sines data centre campus was mentioned in a large corruption scandal in 2023 that led to the resignation of Portugal's Prime Minister and arrests of several officials.[288,289] At the time of writing this report, the subsea cable project status appears as "suspended" on the EU Funding & Tenders portal (under the EU's Connecting Europe Facility programme)[290] while the project still features on the Global Gateway project list. The data centre in Sines has been the object of recent accusations that it is damaging natural habitats under Portuguese and European protection status[291] and that it is unsustainable. According to Joao Camargo, an activist following the Sines data centre, greenwashed projects like that "only serve to guarantee profits from useless investments".[292] The data centre would consume much more than all the solar energy produced in Portugal per year and require huge amounts of water, while the created data storage capacity will be wasted on activities like cryptocurrency mining or data accumulation for ChatGPT.[293]

Projects like this highlight the interconnected nature of the EU's internal and external investments, and raise serious concerns that public development budgets under the current EU public finance architecture – including the Global Gateway – could generate unintended negative effects instead of public benefits. Excessive reliance on the private sector for financing digital transformation programmes under the umbrella of development raises concerns of diverting an increasing amount of development funds to maximising private profits through building new 'highways for data'. Moreover, the faulty design of the Global Gateway as a public relations strategy to promote private sector investments risks exacerbating, not fixing, the lack of transparency and accountability regarding projects financed by development banks. In effect, it is impossible to assess the results of implementing Global Gateway projects in the digital sector and the extent to which they are able to deliver positive development objectives, such as increasing access to affordable broadband connection and closing a digital divide or creating local economic and social value.

Moreover, digital transformation can lead to structural exclusion at scale in societies. The economist Mariana Mazzucato (University College London) argues that such problems must be addressed through public governance and involvement in creating digital infrastructure with a clearly set public value instead of leaving it in the hands of the private sector, in order to prevent erosion of the public institutions' ability to guarantee public benefits and the common good.[294] In contrast with such public involvement in digital infrastructure, the design of the Global Gateway digital agenda is oriented to serve the goal of market creation and promoting the EU's digital competition, while the evidence of broader public benefits of this approach in the context of development finance for digital transformation remains to be seen.

The geopolitical nature of development finance under the Global Gateway also risks leaving out investments that are needed for the recipient countries' development objectives. Reports emerge that EU Member States face internal disagreements between themselves and with African governments about projects and regions to receive finance.[295] Concerns about the use of the EU's digital surveillance tools in non-EU countries have also been raised by human rights organisations.[296]

Last but not least, the Global Gateway digital agenda does not consider the major environmental and labour footprint of the digital economy,[297] which highlights the necessity of a carefully planned and democratically scrutinised public investments agenda to avoid wasteful and ineffective infrastructure void of large public benefits. Digitalisation has "fundamentally changed the organization of work", which creates both opportunities and challenges. The latter is particularly the case for "less represented groups, such as women, ethnic minorities, people with disabilities and refugees" and for "low- and middle-income countries".[298] These changes remain unaddressed in the techno-optimistic linear approach of expanding the digital footprints of global corporations.

It is extremely concerning that the EC and the EIB are increasingly prioritising Global Gateway projects in the absence of transparent information that would enable an evaluation of its impacts and developmental additionality and in spite of mounting evidence of risks and negative impacts.[299]

6. Health sector under the Global Gateway

The health sector is one of the five priority areas under the Global Gateway. Yet, projects in this area constitute a small percentage of the total in each year – 8 per cent in 2023 and 10 per cent in 2024. Its projects, implemented in line with the Team Europe approach, cover areas including manufacturing and access to medical technologies, water sanitation, health and reproductive rights, and digital health, as well as enabling a regulatory environment for local production of medicine and medical technologies. Africa is one of the key destinations of these flagship projects, largely focused on infrastructure, development of pharmaceutical supply chains, and local manufacturing.

Among these projects, the sector of vaccine manufacturing is both one of the most significant for global health, after the COVID pandemic, and one which provides most independent research, allowing us to attempt an analysis.

6.1 BioNTech's new production facility in vaccine manufacturing in Rwanda

Regional Health Manufacturing and Access to Vaccines, Medicines and Health Technology Products in Africa (MAV+), under the Team Europe Initiative (TEI), is a flagship project of the Global Gateway and one of the most advanced. Its objective is to increase equitable access to safe, effective, quality, and affordable essential vaccines, medicines, and health technologies for all Africans, including by increasing production capacity and manufacturing plants and by creating the right ecosystem for investment. MAV+ was announced by EC President Ursula von der Leyen in May 2021 with an initial €1 billion backing from the EU budget and European development finance institutions such as the EIB.[300] According to the EC, "these efforts are being complemented by private initiatives. Production facilities of BioNtech (EU) are being established in Senegal, Rwanda and Ghana, and Moderna (US) has (...) announced a major investment in Kenya".[301,302]

The BioNTech-led project in Rwanda is one of the most advanced manufacturing projects since its inauguration in 2023 and has been the focus of recent research by CSOs.[303] Some major concerns detailed in this research include the lack of transparency in project financing on the side of investors and donors, no evidence of project linkages with Rwanda's industrial development, and the dominance of private pharmaceutical interests in the public health system.

The first area of concern is the exact nature of this project: is it purely private investment or does it involve public investment supported by the EU through the Global Gateway?

The private company BioNTech states that the manufacturing facility in Kigali is fully self-financed by an investment of USD 150 million,[304] while acknowledging receiving USD 145 million from CEPI (the Coalition for Epidemic Preparedness Innovations, a global partnership of 30 national governments, the EC, and key philanthropic organisations[305]) to "support BioNTech to establish mRNA vaccine R&D, clinical and commercial-scale manufacturing capabilities at the Company's facility in Kigali, Rwanda".[306]

On the other hand the EU has not directly supported financially the manufacturing facility, but, according to EC President Von Der Leyen, the investment was complemented by Global Gateway efforts, such as adapting the regulatory capacity and fighting counterfeit medicines, among others.[307] The European Commission organised as well a matchmaking event for private sectors partners from the EEA and Africa to work further together.[308] This indicates the EC generally has a supportive role towards BioNTech and other private investments and projects.

President Von Der Leyen, in the aforementioned speech, noted that "the magic really lies in the public-private teamwork".[309] We, however, note that the resulting ambiguity around the project financing and political ownership means that it is difficult to separate private investments from development finance and to understand who is accountable for the impacts of the projects.[310] As evident in other sectoral case studies, this is a recurrent theme of Global Gateway investments.

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A second major problem with the BioNTech project in Rwanda is that it was announced as providing end-to-end manufacturing capacity for mRNA-based vaccines in Africa. However, as documented by Global Health Advocates,[311] the plans involved the use of containers made in Europe to be transformed into manufacturing units.[312] Therefore, this Global Gateway-supported strategy contribution to the sustainable development of the recipient countries' productive capacity is questionable in terms of technology transfer and opportunities for building inter-linkages across the health sector essential for industrial development.[313] An in-depth report jointly produced by Wemos, Afya na Haki, and Health Development Initiative [314] further details the concerns of this project related to sustainable economic diversification, competitiveness, local value-added in supply chains, and sustainable trade.

As evident from the opacity around project financing, the MAV+ initiative risks putting private pharmaceutical companies in charge of providing essential medicines.[315] The same strategy applied during the Covid-19 pandemic – it resulted in unprecedented inequities in access to lifesaving medical products while allowing pharmaceutical companies to reap skyrocketing profits. According to the Dutch NGO SOMO, BioNTech's Covid-19 vaccine profits were worth EUR 10.3 billion (after corporate income tax),[316] making it one of the top pharmaceutical beneficiaries of the pandemic vaccines.

The MAV+ project's investment objectives also conflict with the EU's position on intellectual property (IP) rights and technology transfer and raises questions about the coherence of this approach with the EU's development cooperation principles, including increasing IP access in recipient countries.[317] During the pandemic, while Team Europe was one of the main financial contributors of the COVAX programme, its decision to purchase Covid-19 vaccines through bilateral agreements with pharmaceutical companies contributed to the failure of their equitable goals rollout. In fact, the programme's inequitable and delayed distribution was criticised for being guided by geopolitical interests while sustaining neocolonial patterns through a pandemic response relying on donations from the Global North countries that hoarded the vast majority of available vaccine doses in the first place.[318] For the MAV+ project to be successful in increasing access to medical technologies in Africa, IP barriers to technology transfer should be meaningfully addressed, in conjunction with detailed information on impact measurement and evidence of the EU's approach towards equitable access to end products.

On the issue of IP rights, however, one aspect of MAV+ that is encouraging is the support provided by the EU (EUR 40 million, including the EC, Germany, France, and Belgium)[319] for the mRNA technology transfer programme and hub.[320] This international initiative launched by the World Health Organisation in 2021 aims "to build capacity in low- and middle-income countries to produce mRNA vaccines" and plans to "use publicly available information about an existing COVID-19 vaccine to replicate the technology. This technology was chosen because the originator company has publicly stated that it would not enforce patent rights during the pandemic (…) Intellectual property resulting from this activity will be held by the inventors but will be made freely available".[321]

Conclusions and policy recommendations

According to EC President Ursula von der Leyen's political guidelines,[322] the Global Gateway is part of the EU's foreign economic policy, by investing in infrastructure projects worldwide while pursuing the EU's and its partners' interests.

However, the Global Gateway's main source of funding is the EU's development policy and budget, which according to the EU treaties must have poverty reduction as a primary mission.[323] Furthermore, the NDICI Regulation, which governs this budget, states that 93 per cent of the funding must meet international standards to count as Official Development Assistance.[324]

The analysis shows that what started as the rebranding of geopolitically and commercially appealing projects that were already in the pipeline has now turned into an overarching guiding strategy for the EU's development cooperation and external action.

The evidence in this report raises the concern that the Global Gateway amounts to a strategy from the EU to use international aid and other development finance to increase its role in the world through investment projects rather than truly investing in achieving development outcomes. Even more concerning, the strategic framework of the Global Gateway is being increasingly used to redirect the EU's development budget to explicitly support profitable projects for European companies and the geopolitical interests of the bloc, instead of key development objectives set out in treaties and policies such as poverty eradication and ending inequalities.

Perhaps more worryingly, it appears that this strategy is also set to guide the role of the EU as a global development player in the coming years, certainly according to a draft document leaked to the media in April which proposed the EC's priorities for the rest of this decade[325] and the aforementioned political guidelines of the new EC. The latter did not even mention fighting poverty worldwide.[326]

The evidence also shows that in the practical functioning of the Global Gateway, the EC's claims of a values-based, transparent, and well-governed investment approach are hard to substantiate.

Specifically, the analysis in this report identifies three key issues that undermine the Global Gateway's ability to deliver positive development outcomes in the Global South:

A. **The Global Gateway promotes the EU's commercial and geopolitical interests, encourages the privatisation of infrastructure and public services in the Global South, and risks increasing the debt burden of partner countries. A question arises as to whether the priority of the Global Gateway is to enable EU investments globally or to fight poverty and inequality worldwide.**

   As this report reveals, complex financing structures which blend public with private finance, as well as export credits, are being created to generate profits from 'development' opportunities.

   Moreover, the Global Gateway strategy is implemented using complex financial instruments in heavily indebted countries with high poverty levels, which can further exacerbate their debt burdens and plunge people deeper into poverty. This is particularly alarming in Global South countries that already end up paying more in debt than they receive in aid.

   The report also shows that the Global Gateway enables investments by private companies from the EU's largest economies in countries with historical colonial links, thereby raising concerns of a neocolonial approach – syphoning resources from the Global South at the expense of local development.

B. **There is a risk of negative impacts on human rights and the environment.**

   The Global Gateway strategy is explicit about its human rights, democratic, and values-based approach as opposed to that of other international development players such as China. However, as this report shows, this is far from the reality. The risks of negative impacts on rights are already evident, including on people's jobs and livelihoods. There are also impacts on health, with negative consequences for the delivery of public services. These risks are exacerbated by the fact that the Global Gateway is financing companies and governments with problematic track records of human rights impacts.

Damaging environmental impacts are also a significant risk. This includes not only projects with a major environmental footprint, such as hydrogen projects, lithium mining, and data centres, but also port expansions, airports, and transport corridors. The Global Gateway still finances polluting giants such as TotalEnergies and Bayer – members of the Global Gateway's Business Advisory Group (see below) – for their renewable energy projects, despite fossil fuel companies' lack of credible decarbonisation plans and backtracking on their climate promises.[327] Many hydropower dams – including questionable megaprojects – are also included, despite evidence of risks in financing large-scale hydropower projects. Some of these dams are flagship projects despite their negative impacts on thousands of people from Indigenous and local communities, on their land and crops, or on fragile river systems.

The European Investment Bank (EIB), a key development finance institution implementing the Global Gateway, is heavily criticised by CSOs, parliamentarians, academics, and journalists for structural issues in its functioning. This criticism highlights inadequate impact assessments, no clear and effective human rights due diligence, weak transparency standards, and a lack of an independent complaints' mechanism. These factors raise concerns about the credibility of the Global Gateway's rights- and values-based narrative.[328]

Among the Global Gateway projects feature a concerning raw materials agreement signed between Rwanda and the EU. It takes place in the context of the ongoing armed conflict in the DRC's mineral-rich province in which Rwanda is accused of being involved, with the risk that the agreement could exacerbate the conflict. With a lack of proper assessment of investments in conflict-affected areas and in countries violating international law, the Global Gateway can contribute to fostering conflict through its investments.

C. The way in which the Global Gateway has been developed and implemented has been neither democratic nor transparent.

The Global Gateway was unilaterally introduced by the European Commission and the High Representative/ Vice President of the European Commission, excluding Global South countries from its design, governance, and priority-setting process from the start. Elected bodies (including parliaments), civil society, and independent experts in recipient countries have no meaningful role in decision-making or accountability. Instead, EU officials and development finance institutions make top-down decisions about what kind of projects to support with EU funds, risking the process with the potential influence of the corporate lobby. This contradicts the EU's existing commitment to development effectiveness principles such as ownership of development priorities by developing countries, focus on results, and mutual accountability to the poorest people. It contradicts the Global Gateway's principle of equal partnerships, as projects "will be designed, developed and implemented in close cooperation and consultation with partner countries".[329] Finally, it contradicts good governance and transparency principles because "those most affected by potential projects – local communities, businesses and partners – must have their full say through proper public consultations and civil society involvement".[330]

Even though the European Commission has created a Global Gateway Civil Society and Local Authorities Advisory Platform, it currently is little more than a 'tick-box' exercise, as it is unable to influence the approach, selection, and design of projects. At the same time, the Business Advisory Group, which is made up of 59 large, mainly European companies and business associations, is strongly influential – a quick look at the EU's Global Gateway flagship projects reveals that members' names appear in many of them.

There is a gaping hole in publicly accessible information on projects' financing, tendering processes, awarded contracts, and independent and transparent financial, human rights, and environmental assessments. Again, this jeopardises the good governance and transparency principle which states that "delivering projects that work for people will require transparency, accountability, and financial sustainability. It will need open access to public procurement and a level playing field".

This makes it impossible to monitor and evaluate how projects contribute to development objectives, or the risk of negative impacts in recipient countries. It will be again crucial to follow the good governance and transparency principle when it states that "it will need (...) a clear set of agreed deliverables to ensure that Global Gateway projects say what they will deliver – and deliver what they promise". Beneficiaries of Global Gateway contracts include companies working in data, clean tech, digitalisation solutions, and pharmaceuticals, turning the Global South countries into the consumers of EU technologies and infrastructures. It is also unclear how projects can address gender equality and women's empowerment, and problems such as uneven impacts of the climate crisis and job creation in the energy transition, since the Global Gateway does not set out specific targets to do so.

Ultimately, the Global Gateway strategy shows worrying patterns and trends in terms of its lack of transparency and its order of priorities, which seem to prioritise EU businesses investment opportunities over projects with clear development additionality and EU development objectives, such as fighting poverty and inequality.

Policy recommendations

As a new European Parliament and College of Commissioners take office for the period 2024-29, now is a key moment to reflect on what type of development cooperation the EU is geared towards. The Fourth United Nations Conference on Financing for Development, to be held in Spain in mid-2025, also calls for a reassessment of the EU's development priorities for the bloc to contribute to a just development agenda at the global level. Amid geopolitical shifts offering diverse sources of development finance, the EU should recognise that an offer of 'just and equal partnerships' cannot simply be a branding exercise with empty promises. If the EU wants to be a relevant development actor, it is critical that it lives up to the standards it claims to uphold.

In light of these findings, the EU Member States and EU institutions should consider the following policy recommendations:

A. **Re-evaluate the Global Gateway strategy without further delay.** This should include:

- Reaffirming the primary missions of the Global Gateway (as an EU instrument of development cooperation and as a vehicle to channel ODA), namely poverty reduction worldwide, the sustainable development of the planet, solidarity and mutual respect among peoples, and the protection of human rights, in particular the rights of the child. The other objectives currently assigned to the Global Gateway, such as foreign policy goals and promoting the EU's economic interests, cannot be pursued with EU ODA.
- Working with the Global South to produce a strong cooperation strategy rooted in sovereignty, self-sufficiency, and a just international cooperation framework.
- Prioritising projects promoting regional cooperation instead of country by country projects, which present a convenient opportunity for European companies but can risk fuelling a race to the bottom among states to attract investments.
- Supporting public-public partnership projects and civil society organisations with grants-based finance to ensure the provision of public services and sustainable infrastructure with social and environmental benefits.
- Including companies in projects where there is strong and clear evidence of long-term development additionality. Prioritising local companies, especially women-led, that support environmental sustainability and the socio-economic needs of Indigenous and local communities.
- Publishing the specific deliverables and indicators contributing to the reduction of poverty and inequalities – including gender – for each project, which must allow clear accountability and evaluation of the projects to determine what are the impacts of the investments and who benefits from them.

B. **Adopt high standards in the Global Gateway's decision-making, procurement, transparency, and implementation processes.** At a minimum, this should entail the following measures:

- The European Commission must make publicly available all minutes of meetings between its officials and members of the Business Advisory Group, where the Global Gateway is discussed.
- The European Commission must provide evidence that the Global Gateway is not a source of favouritism for EU Member States' own economic sector and a way of promoting informally tied aid.
- All documents that the European Commission and Development Finance Institutions (DFIs) have to support their project selection should be made public. DFIs implementing Global Gateway projects, such as the EIB, must make each project-related debt assessment publicly available.
- The criteria for selection and beneficiaries of awarded contracts to companies, and guarantees and grants for projects under the European Fund for Sustainable Development Plus (EFSD+) must be published, as well as disaggregated data on total project finance from all public and private sources.
- Business trips, missions, and activities focused on supporting EU corporate interests related to Global Gateway projects should not be financed by the EU development budget.
- Only private sector companies that comply with the highest standards of due diligence, as set out in the EU Corporate Sustainability Due Diligence Directive, should be eligible to implement Global Gateway projects. Furthermore, companies need to ensure collective bargaining rights, fulfil labour standards in line with ILO recommendations, be aligned with the Paris Agreement, and demonstrate a clear contribution to development objectives.

C. **Put in place processes and mechanisms to allow for public and parliamentary scrutiny of the Global Gateway, both in Europe and in the Global South.** The European Parliament and civil society organisations should be allowed to formally scrutinise the Global Gateway strategy and its implementation. In its current form, the Civil Society and Local Authorities Advisory Platform has major limitations. The mandate and the role of the platform has to be fully transformed, and it must allow for the inclusive participation of all interested CSOs and women rights' organisations in scrutinising the Global Gateway's implementation to date. CSOs should have an active role in the selection, design, and implementation of all projects receiving support from the EU development budget and EU external investments. Additionally, CSOs should continue to have access to independent and well-resourced funding channels to strengthen their work and societal role, enabling them to choose their work areas based on their own priorities.

D. **Review the alignment of the Global Gateway with the EU's development objectives before the EU budget for the period post-2027 is approved.** The European Court of Auditors (ECA) should carry out an evaluation of the Global Gateway's alignment with the EU's development objectives. A public civil society consultation should be carried out by the European Commission to evaluate the Global Gateway so as to ensure that CSOs help to shape the EU's next development cooperation strategy. The new College of Commissioners for the period 2024-29 should follow the development and external action mandate set out in the EU's Treaties and ensure that development policy is not a strategy to generate corporate profits.

The world is grappling with a series of crises: economic distress, escalating warfare, indebtedness, and planetary demise. As one of the most powerful development actors, the EU has the resources and capacity to contribute to poverty eradication, to fight against the climate crisis, and tackle inequalities. It must champion a vision for a just global transformation built on principles of equality, rights, sovereignty, socio-economic development, and a fair international financial architecture. Only then can the EU develop true partnerships, overcoming historic injustice and persisting exploitation. In its current form, the Global Gateway is falling far short of this.

Annex 1
Global Gateway flagship projects 2023

#	Sector	Country/Region	Name and Related Priority
1	Digital	Mauritania	Digital Economy and Society in sub-Saharan Africa: EurAfrica Gateway Cable & Building Secure Regional Fibre Optic Backbones Regional TEI1
2	Digital	Regional	Part of the “EUAfrica Global Gateway investment package – Digital Transition” that was launched in the 6th EU–AU Summit. D4D Framework for Digital Economy and Society in sub-Saharan Africa TEI
3	Digital	Kenya	HumanCentred Digitalisation, Reduced digital gap pillar, National TEI
4	Digital	Brazil, Uruguay	Part of national TEI Brazil Digital Transformation EU–LAC Digital Alliance Regional TEI
5	Digital	Regional	EU–LAC Digital Alliance Regional TEI
6	Digital	Central America	Central America Trade Facilitation/ Economic Integration. Part of regional EU initiative
7	Digital	Central Asia (regional)	Digital Connectivity in Central Asia Regional TEI
8	Digital	Philippines	Sustainable Connectivity Regional TEI and national TEI Digital Transformation and Connectivity
9	Digital	Georgia	Black Sea Digital Connectivity. Black Sea Digital Cable
10	Digital	Georgia, Armenia	EIP Georgia
11	Digital	Algeria, Egypt, Morocco, Tunisia	Medusa optical fibre cable. Part of EIP on Southern Neighbourhood
12	Climate and Energy	Benin	Africa–EU Green Initiative Regional TEI
13	Climate and Energy	Burundi	Africa–EU Green Initiative Regional TEI
14	Climate and Energy	Cabo Verde	Africa–EU Green Initiative Regional TEI
15	Climate and Energy	Democratic Republic of Congo	Strategic partnership on critical raw materials
16	Climate and Energy	Djibouti	Africa–EU Green Energy Initiative Regional TEI
17	Climate and Energy	Democratic Republic of Congo, Rwanda, Burundi	Africa–EU Green Energy Initiative Regional TEI
18	Climate and Energy	Egypt	Africa–EU Green Energy Initiative Regional TEI
19	Climate and Energy	Ivory Coast	Africa–EU Green Energy Initiative Regional TEI
20	Climate and Energy	Madagascar	Africa–EU Green Energy Initiative Regional TEI
21	Climate and Energy	Morocco	Africa–EU Green Energy Initiative Regional TEI
22	Climate and Energy	Mozambique	Africa–EU Green Energy Initiative Regional TEI
23	Climate and Energy	Namibia	Africa–EU Green Energy Initiative Regional TEI
24	Climate and Energy	Niger	Africa–EU Green Energy Initiative Regional TEI

#	Sector	Country/Region	Name and Related Priority
25	Climate and Energy	Tanzania	Africa–EU Green Energy Initiative Regional TEI
26	Climate and Energy	Zambia	Africa–EU Green Energy Initiative Regional TEI
27	Climate and Energy	Nigeria	Africa–EU Green Energy Initiative Regional TEI and TEI Green Economy Alliance
28	Climate and Energy	Nigeria	Africa–EU Green Energy Initiative Regional TEI and TEI Green Economy Alliance
29	Climate and Energy	Nigeria	Africa–EU Green Energy Initiative Regional TEI and TEI Green Economy Alliance
30	Climate and Energy	Namibia	TEI on inclusive Green Growth with Namibia
31	Climate and Energy	Congo Basin Central Africa, West Africa Forests, Sudano-Sahelian savannahs of West Africa, Eastern Rift savannahs, Southern Africa	NaturAfrica Regional TEI
32	Climate and Energy	Argentina	Regional TEI LAC Green Transition
33	Climate and Energy	Brazil	Regional TEI LAC Green Transition
34	Climate and Energy	Chile, Uruguay, Argentina, Colombia, Paraguay, poss. Costa Rica	Regional TEI LAC Green Transition
35	Climate and Energy	Chile, Argentina	Regional TEI LAC Green Transition
36	Climate and Energy	Costa Rica	Regional TEI LAC Green Transition
37	Climate and Energy	Panama	Regional TEI LAC Green Transition
38	Climate and Energy	Regional	Regional TEI LAC Green Transition and regional TEIs Amazon Basin, Five Great Forests of Mesoamerica
39	Climate and Energy	Ecuador	TEI Ecuador
40	Climate and Energy	Dominican Republic, Jamaica, Costa Rica, Colombia, Peru	Global Green Bond Initiative Global TEI
41	Climate and Energy	Bangladesh	Green energy transition National TEI Bangladesh
42	Climate and Energy	Fiji	Green-Blue Alliance for the Pacific and Timor-Leste TEI
43	Climate and Energy	Papua New Guinea	Green-Blue Alliance for the Pacific and Timor-Leste TEI
44	Climate and Energy	Pacific islands	Green-Blue Alliance for the Pacific and Timor-Leste TEI
45	Climate and Energy	Indonesia	Indonesia Green TEI
46	Climate and Energy	Kazakhstan	Central Asia WaterEnergyClimate change Regional TEI

#	Sector	Country/Region	Name and Related Priority
47	Climate and Energy	Tajikistan	Central Asia WaterEnergyClimate change Regional TEI
48	Climate and Energy	Mongolia	National Mongolian TEI Green economic growth
49	Climate and Energy	Mongolia	National Mongolian TEI Green economic growth
50	Climate and Energy	Nepal	Nepal National TEI on Green recovery
51	Climate and Energy	Vietnam	ASEAN Green Initiative Regional TEI
52	Climate and Energy	Vietnam	ASEAN Green Initiative Regional TEI
53	Climate and Energy	Serbia, Montenegro, Bosnia and Herzegovina	The Trans Balkan Electricity Corridor: Serbia – Montenegro – Bosnia and Herzegovina EIP on Western Balkans
54	Climate and Energy	Tunisia	ELMED inter-connector EIP Tunisia
55	Climate and Energy	Israel	EuroAsia project Electricity interconnection cable Israel Cyprus Greece
56	Climate and Energy	Jordan	Standalone project EIP Jordan
57	Climate and Energy	Jordan	National TEI Sustainable Water Management
58	Climate and Energy	South Africa, later Mozambique, Uganda	Bio 2 Watt (Climate Investor One & Climate Investor Two)
59	Climate and Energy	Vietnam	Tra Vinh (Climate Investor One) 48 MW near-shore wind project
60	Climate and Energy	Papua New Guinea	PNG Rabaul Port Rehabilitation and Infrastructure greening
61	Transport	Benin	AU–EU Investment Package
62	Transport	Gambia	AU–EU Investment Package Flagships on transport / strategic corridors: Praia – Dakar – Abidjan
63	Transport	Guinea Bissau	AU–EU Investment Package Flagships on transport / strategic corridors: Praia – Dakar – Abidjan
64	Transport	Senegal	AU–EU Investment Package Flagships on transport / strategic corridors: Praia – Dakar – Abidjan
65	Transport	Senegal	AU–EU Investment Package Flagships on transport / strategic corridors: Praia – Dakar – Abidjan
66	Transport	Cameroon	AU–EU Investment Package Flagships on transport / strategic corridors: Libreville – Kibi / Douala – N'Djamena
67	Transport	Djibouti	Building of a second airport
68	Transport	Egypt	Modernisation of the Alexandria Area Control Centre. TEI Connected Economy and Society in Egypt
69	Transport	Kenya	AU–EU Investment Package Flagships on transport / strategic corridors: Mombasa – Kisangani

#	Sector	Country/Region	Name and Related Priority
70	Transport	Republic of Congo	Infrastructure – Port of Pointe-Noire Potential TEI
71	Transport	Phase 1: projects in Egypt and Morocco	Global Maritime Green Corridor
72	Transport	Morocco	Tramway Rabat III
73	Transport	Central Asia (Kazakhstan, Kirgizstan, Tajikistan, Turkmenistan, Uzbekistan)	Central Asia –Potential Global Gateway Project
74	Transport	North Macedonia, Kriva Palanka –Border with Bulgaria Section	North Macedonia Bulgaria Corridor VIII Rail Interconnection EIP on Western Balkans
75	Transport	Indonesia	Regional Railway Surabaya
76	Transport	Laos, Thailand, Vietnam	Southeast Asia Regional Economic Corridor and Connectivity Project
77	Transport	Angola	Economic Diversification pillar
78	Health	Ghana	MAV+: Manufacturing and Access to Vaccines, Medicines & Health Technology Products in Africa
79	Health	Rwanda	MAV+: Manufacturing and Access to Vaccines, Medicines & Health Technology Products in Africa
80	Health	Senegal, Rwanda, Ghana, South Africa	MAV+: Manufacturing and Access to Vaccines, Medicines & Health Technology Products in Africa
81	Health	Guatemala	Green Transition Regional LAC TEI
82	Health	Mexico, Panama, Costa Rica, Barbados	EU–LAC Partnership on local manufacturing of vaccines, medicines and other health technologies, and strengthening health systems resilience
83	Health	Ecuador	TEI Ecuador
84	Health	Ecuador	TEI Ecuador
85	Education and Research	Mozambique	E-youth, +EMPRE GO
86	Education and Research	Regional (sub-Saharan Africa)	Regional Teacher Programme for Africa (sub-Saharan Africa)
87	Education and Research	LAC Regional	Part of national TEI Haiti on Education Vivre ensemble and part of regional TEI on Human Development and regional TEI Inclusive and Equal Societies

Source: Council of the European Union, 24 February 2023.[331]

Annex 2
Global Gateway flagship projects 2024

#	Sector	Country/Region	Name	Related Priority
1	Climate and Energy	Ecuador – South America	Forest Partnership to promote bioeconomy and trade	TEI Latin America and the Caribbean Digital Alliance – part of the LAC GGIA
2	Climate and Energy	Caribbean – Regional	Addressing the threat of the sargassum algae plague in the Caribbean	Part of the LAC GGIA
3	Climate and Energy	Barbados – Caribbean	Energy transition through green hydrogen storage	Part of the LAC GGIA
4	Climate and Energy	Trinidad and Tobago – Caribbean	Decarbonizing the petrochemical industry through renewable energies	Part of the LAC GGIA
5	Climate and Energy	Argentina – South America	Developing the sustainable lithium value chain in the Salta and Jujuy provinces	Developing of critical raw materials value chain – part of the LAC GGIA
6	Climate and Energy	South Asia – Regional	South Asia Energy Connectivity	Nepal Green recovery
7	Climate and Energy	India – South Asia	Sustainable Urbanisation	N/A
8	Climate and Energy	Pakistan – South Asia	Climate Resilient Infrastructure (hydropower and irrigation systems) and TVET Centres	TEI Building back better through green jobs creation
9	Climate and Energy	Cambodia – South-East Asia	Water treatment plant in Phnom Penh	TEI Green energy and industrial value chains
10	Climate and Energy	Central Asia – Regional	Critical Raw Materials (CRM)	N/A
11	Climate and Energy	Laos – South-East Asia	Increasing trade, investment and connectivity in agriculture and forestry (TICAF)	TEI Laos Green Deal
12	Climate and Energy	Cameroon – West/Central Africa	Construction of a hydroelectric dam (420 MW) NACHTIGAL	Villes vertes inclusives et durables – part of Africa GG Investment Package
13	Climate and Energy	Rehabilitation of Nalubaale-Kiira Hydropower Plants (380 MW)	Hydropower plant in Uganda	Rehabilitation of Nalubaale-Kiira Hydropower Plant (380 MW)
14	Climate and Energy	Senegal – Western Africa	Cleanup of Hann Bay (Dakar)	Promouvoir une économie verte et digitale – part of Africa GG Investment Package
15	Climate and Energy	Malawi – Southern Africa	Eastern Backbone Power Transmission	TEI Green Growth – part of the Africa GG Investment Package
16	Climate and Energy	Madagascar – Southern Africa	Preservation of terrestrial and marine landscapes, Talaky Be	Madagascar TEI Pacte Vert – part of the Africa GG Investment Package
17	Climate and Energy	Zambia, Tanzania, Kenya – Southern Africa	Zambia – Tanzania – Kenya (ZTK) Interconnector	Part of the Africa GG Investment Package
18	Climate and Energy	Zambia, DRC – Southern Africa	Kolwezi – Solwezi interconnector	Part of the Africa GG Investment Package
19	Climate and Energy	Rwanda – East/Central Africa	Construction and development of the Kigali Wholesale Market	Investing in sustainable and inclusive agricultural transformation – part of the Africa GG Investment Package

#	Sector	Country/Region	Name	Related Priority
20	Climate and Energy	Rwanda, Tanzania, Uganda, Zambia – East/Central Africa	Critical Raw Materials (CRM) Partnership Roadmap	Part of the Africa GG Investment Package
21	Climate and Energy	Somalia – East/Central Africa	Irrigation infrastructure	Clean Energy and Climate Resilient Economy – part of the Africa GG Investment Package
22	Climate and Energy	Albania, Armenia, Bosnia & Herzegovina, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, , Türkiye, Ukraine – Neighbourhood	Critical Raw Materials Exploration Facility	N/A
23	Climate and Energy	Ukraine – Neighbourhood East	Ukrenergo – power transmission	N/A
24	Climate and Energy	Moldova – Neighbourhood East	GrCF2 W1- Termoelectrica: Chisinau District Heating	EIP Flagship 3 (NEAR East)
25	Climate and Energy	Jordan – Neighbourhood South	Aqaba Solid Waste Project	EIP Flagship EU support to green economy in Jordan. TEI on Sustainable Water Management in Jordan
26	Climate and Energy	Jordan – Neighbourhood South	West Irbid Wastewater Treatment Plant	EIP Flagship 11 Resource Efficiency including water and waste management, and biodiversity TEI on Sustainable Water Management in Jordan
27	Climate and Energy	Tunisia – Neighbourhood South	1.7 GW renewable energy programme	EIP Flagship 10 Energy transition and energy security
28	Climate and Energy	Ukraine – Neighbourhood East	The energy efficiency of buildings	N/A
29	Climate and Energy	Albania – Western Balkans	Floating solar photovoltaic power plant	N/A
30	Climate and Energy	Egypt – Neighbourhood South	Expansion of the Gabal Asfar Wastewater Treatment Plant	N/A
31	Climate and Energy	Regional – Neighbourhood South	Energy Efficiency of Buildings	N/A
32	Climate and Energy	Egypt – Neighbourhood South	Green and Sustainable Industries	N/A
33	Climate and Energy	Barbados – Caribbean	Reduce chronic water shortages and improve wastewater systems	Part of the LAC GGIA
34	Climate and Energy	Africa – Regional	Climate adaptation and resilience in Africa – Pilar III and IV –	TEI: Adaptation and Resilience in Africa
35	Climate and Energy	Mozambique –Southern Africa	Coastal protection Beira	N/A
36	Climate and Energy	Togo – Western Africa	Coastal protection Togo	N/A

#	Sector	Country/Region	Name	Related Priority
37	Climate and Energy	Senegal – Western Africa	Irrigation programme PARIIS; and rural development programme PADAER II	Senegal Green Economy (Economie Verte)
38	Climate and Energy	Paraguay – South America	Water and Sanitation Programme	Paraguay Green Deal
39	Climate and Energy	Honduras – Central America	Rural development and productivity	Honduras – Climate Change and Natural Resource Management
40	Climate and Energy	Dominican Republic – Caribbean	Solid waste management	Dominican Republic Green and Sustainable Transition
41	Climate and Energy	Brazil – South America	Project Paulo Freire II - Development of capacities for overcoming rural hunger and extreme poverty	N/A
42	Climate and Energy	Mexico – Central America	Sustainable multidimensional Energy Project	LAC GGIA
43	Climate and Energy	Jamaica – Caribbean	Renewable energy production	LAC GGIA
44	Climate and Energy	Ghana – Western Africa	Solar power plant Kaleo	Smart green and digital recovery – part of the Africa GG Investment Package
45	Climate and Energy	Côte d'Ivoire – Western Africa	High voltage transmission line (backbone)	Transition Bas Carbone
46	Climate and Energy	Mozambique – Southern Africa	Modernisation of two hydropower plants	Mozambique's Green Deal
47	Climate and Energy	DRC – Central Africa	Rehabilitation and expansion of drinking water infrastructure in the major city of Mbuji Mayi	N/A
48	Climate and Energy	DRC – Central Africa		N/A
49	Climate and Energy	Kenya – East/Central Africa	Olkaria I & IV Uprating project	Part of the TEI Kenya – Green Transition
50	Climate and Energy	Angola – Southern Africa	Solar Park for Rural Electrification	N/A
51	Climate and Energy	Cameroon – West/Central Africa	Modernisation of the industrial tool and energetic transition of Sodecoton	N/A
52	Climate and Energy	Ethiopia – Eastern Africa	Projet géothermie TMGO	N/A
53	Climate and Energy	South Africa – Southern Africa	Just Energy Transition Partnership	N/A
54	Climate and Energy	Kenya – Eastern Africa	Transfer of innovative Polish biogas technology to the agricultural sector in Kenya	No reference (private sector proposal)
55	Climate and Energy	Colombia – South America	Urban climate resilience	N/A
56	Climate and Energy	South Africa and Namibia – Southern Africa	Financial platforms for green hydrogen	N/A

#	Sector	Country/Region	Name	Related Priority
57	Climate and Energy	Senegal – Western Africa	Just Energy Transition Partnership (JETP)	N/A
58	Climate and Energy	Nigeria – Western Africa	Jigawa Solar PV project	N/A
59	Climate and Energy	Uzbekistan – Central Asia	Aral Sea project	Regional TEI Water, Climate and Energy in Central Asia
60	Climate and Energy	Côte d'Ivoire – West Africa	WASUNA project	TEI AEGEI
61	Climate and Energy	Morocco – Neighbourhood South	Sustainable urban development with the FEC	Part of EIP Flagship green growth and climate action: national TEI green transition
62	Digital	LAC – regional	EU–LAC Digital Accelerator	TEI EU–LAC Digital Alliance – part of the LAC GGIA
63	Digital	Colombia – South America	Electrification of social infrastructures	Part of the LAC GGIA
64	Digital	DRC – East/Central Africa	Extension of digital connectivity	Part of the Africa GG Investment Package
65	Digital	Ethiopia – East/Central Africa	Rehabilitation and modernisation of the national transmission grid in Ethiopia	Part of the Africa GG Investment Package
66	Digital	Tanzania, Madagascar – East/ South Africa	Investing in mobile networks in Madagascar and Tanzania	Tanzania: Green and Smart Cities – part of the Africa GG Investment Package
67	Digital	DRC, Zambia, Zimbabwe, Malawi, Mozambique – Southern and Eastern Africa	Construction of fibre-optic cables	Part of the Africa GG Investment Package
68	Digital	Sub-Saharan Africa – regional	AfricaConnect4	Part of the Africa GG Investment Package
69	Digital	Sub-Saharan Africa – regional	Africa–Europe Digital Regulators Partnership	Part of the Africa GG Investment Package
70	Digital	Neighbourhood East, Neighbourhood South, Western Balkans, Central Asia + Mongolia, Türkiye – Regional	Partnerships with private institutional investors	N/A
71	Digital	FI, SE, DK, GL, US, CA, JP – North Atlantic and Arctic	Northern EU Digital Gateways	N/A
72	Digital	Brazil – South America	Green Amazon / Amazonia Verde	N/A
73	Digital	Colombia – South America	Paz Total Connectivity	N/A
74	Digital	Mozambique – Southern Africa	Fiber Flow Mozambique: enabling digitalisation	N/A
75	Digital	Indonesia – South-East Asia	Nusantara, the new capital of Indonesia – building prosperity with connectivity and data	N/A

#	Sector	Country/Region	Name	Related Priority
76	Digital	Bangladesh – South Asia	Connectivity Revolution: Transforming Lives in Bangladesh	N/A
77	Digital	Nigeria – Western Africa	EU–Nigeria Digital Economy Package	N/A
78	Digital	South Africa – Southern Africa	Implementation of Time Synchronization System to improve cybersecurity level of national Air Traffic and Navigation Service	N/A
79	Digital	Thailand – South-East Asia	Implementation / upgrading of the critical infrastructure of Thailand's main energy operator, the Electricity Generating Authority of Thailand (EGAT).	N/A
80	Education and Research	Uganda – East/Central Africa	Building WASH facilities in schools	Demography and Social Inclusion – part of the Africa GG Investment Package
81	Education and Research	Angola – Southern Africa	TVET infrastructure and modernisation of agricultural vocational training	Economic diversification – part of the Africa GG Investment Package
82	Education and Research	Haiti – Caribbean	Construction of a TVET school	National TEI Education and TVET – part of the LAC GGI
83	Education and Research	Iraq – Middle East	Reconstruction of cultural heritage in historical urban centres	Team Europe For Iraq
84	Education and Research	Nigeria – Western Africa	Rehabilitation and equipment of TVET, training institutions in Benue, Plateau, and Oyo States	Green Economy Alliance – part of the Africa GG Investment Package
85	Education and Research	Benin – Western Africa	Renovation and construction of professional and technical schools	Croissance durable et emploi – part of the Africa GG Europe Investment Package
86	Education and Research	Sub-Saharan Africa – Regional	Youth Mobility for Africa	Mobility for Africa – part of the Africa GG Investment Package
87	Education and Research	Madagascar – Southern Africa	Improving the Vocational and Technical Education system	Madagascar TEI Investing in Youth – part of the Africa GG Investment Package
88	Education and Research	Zambia – Southern Africa	Early childhood development	TEI Human Development – part of the Africa GG Investment Package
89	Education and Research	Tanzania – Southern Africa	Gender Transformative Action	Part of the Africa GG Investment Package
90	Education and Research	Cambodia – South-East Asia	Partnership in Education for green and digital jobs	TEI Sustainable landscapes, forests and agriculture. TEI Green energy and industrial value chain
91	Education and Research	Nepal – North Asia	Quality Education for All	TEI Green Recovery
92	Education and Research	Sub-Saharan Africa – Regional	VET Toolbox 2: Enhanced Delivery of Demand-driven Skills Development for Investment in Africa	N/A
93	Health	Peru – South America	Safe drinking water and sustainable water management in urban areas	National TEI Green Deal – Part of the LAC GGIA

#	Sector	Country/Region	Name	Related Priority
94	Health	Nigeria – Western Africa	MAV+: local production of vaccines and medicines	Part of the Africa GG Investment Package
95	Health	Mongolia – Central Asia	Construction of Darkhan Hospital	Mongolia TEI: Green Economic Growth
96	Health	Costa Rica – Central America	Accelerating pharma manufacturing	Part of the LAC GGIA
97	Health	Brazil – South America	Modernisation of water and sewage	Green Deal – part of LAC GGIA
98	Health	Africa – Regional	Team Europe Support Structure (TESS) for MAV+	Part of the Africa GG Investment Package
99	Health	Sub-Saharan Africa	Digital Health for Health Systems Strengthening and Universal Health Coverage (UHC)	TEI Digital Health for Health Systems Strengthening and Universal Health Coverage
100	Health	Sub-Saharan Africa	Sexual and Reproductive Health and Rights (SRHR) in sub-Saharan Africa	SRHR in Sub-Saharan Africa
101	Health	Bolivia – South America	Urban Areas Integral Water - Management Programme and Water and sanitation programme for rural communities, medium and small cities	Bolivia Green and Resilient Development
102	Health	Benin – Western Africa	Treatment plant for wastewater in the west of Cotonou	N/A
103	Health	Rwanda – East/ Central Africa	Part of MAV+: Manufacturing and Access to Vaccines, Medicines & Health Technology Products in Africa	Part of the Africa GG Investment Package
104	Health	Cambodia – Southeast Asia	One Health	N/A
105	Health	Regional – LAC	EU–LAC Partnership on vaccine production and health systems resilience	EU–LAC Partnership on vaccine production and health systems resilience
106	Health	Madagascar – Southern Africa	Salama – support for central drug purchasing	TEI Investing in Youth
107	Transport	Dominican Republic – Caribbean	Expansion and upgrade of Santo Domingo's urban transport	National TEI Green and sustainable transition – part of the LAC GGIA
108	Transport	Costa Rica – Central America	Electrification of the urban bus fleet	National TEI Green Recovery, Decarbonisation and Sustainable Urban Mobility – part of the LAC GGIA
109	Transport	Mauritania – Western Africa	Construction of land-based and maritime/ port infrastructures	Transition vers une economie verte et bleue – part of the Africa GG Investment Package
110	Transport	Chad – Western Africa	Modernisation of the N'Djamena – Douala corridor, incl. construction of a bridge	Strategic Corridors: Libreville – Kribi / Douala – N'Djamena (Central Africa: Gabon, Equatorial Guinea, Cameroon, Chad, São Tomé and Príncipe) – part of the Africa GG Investment Package

#	Sector	Country/Region	Name	Related Priority
111	Transport	Nigeria – Western Africa	Lagos Inland Water Transport	Strategic Corridors: Abidjan – Lagos – part of the Africa GG Investment Package
112	Transport	Ghana – Western Africa	Rehabilitation feeder and farm roads	Smart green and digital recovery – part of the Africa GG Investment Package
113	Transport	Cabo Verde – Western Africa	Mindelo port expansion	Strategic Corridors: Praia – Abidjan – Lagos – part of the Africa GG Investment Package
114	Transport	Armenia – Caucasus	Syunik Customs and Logistics Center (Free Economic Activity Center)	EIP Flagship 4: Building resilience of the Southern regions
115	Transport	Armenia – Caucasus	Sisian–Kajaran Road (North–South Corridor Road Project)	EIP Flagship 2: Boosting connectivity and socioeconomic development. EIP Flagship 4: Building resilience of the Southern regions.
116	Transport	Moldova – Neighbourhood East	Moldova Roads Rehabilitation V	EIP Flagship 4 & Improving Connectivity – anchoring Moldova in the TEN-T
117	Transport	Ukraine – Neighbourhood East	Ukraine Recovery Guarantee Facility	EIP Flagship 3
118	Transport	Jordan – Neighbourhood South	Aqaba Electric Bus Project	EIP Flagship: EU support to green economy in Jordan
119	Transport	Ukraine, Moldova – Neighbourhood East	Solidarity Lanes: Moldova and Ukraine	N/A
120	Transport	Albania – Western Balkans	Tirana by-pass: Blue Highway	N/A
121	Transport	Morocco – North Africa – Neighbourhood South	ONCF Rail Rehabilitation	N/A
122	Transport	Egypt – Neighbourhood South	Railway Upgrading	N/A
123	Transport	Zambia, Angola, DRC – South/Central Africa	Lobito Corridor	DRC: Developing of critical raw materials value chain (L.63) Angola: Economic Diversification (L.4). Part of the Africa GG Investment Package
124	Transport	Global – Asia/Africa/ Latin America/ Caribbean	Sustainable Aviation Fuels	N/A
125	Transport	Global – Pacific/Africa/ Latin America/ Caribbean	Global Maritime Technology Cooperation Centres: phase 2	N/A
126	Transport	Brazil – South America	Construction and Operation of Port Infrastructure: Establishment of a green and digital corridor between the Portuguese Port of Sines and the Brazilian Port of Pecém, Maranhão	Part of the LAC GGIA (Ports infrastructure in Brazil). Linked with 2023 Global Gateway Flagship green and digital corridor between the Port of Sines and the Port of Barra Do Dande in Angola
127	Transport	Malaysia – Southeast Asia	Development of the Port of Lumut Maritime Industrial City	N/A

#	Sector	Country/Region	Name	Related Priority
128	Transport	Senegal – Western Africa	Casamance project: Upgrade and operation of the port of Ziguinchor	N/A
129	Transport	Tanzania – Southern Africa	Msimbazi Basin Development Project	N/A
130	Transport	Ethiopia – Eastern Africa	Cool Port Addis	N/A
131	Transport	India – South Asia	Green urban mobility	N/A
132	Transport	Pakistan – South Asia	Livelihood Support and Community Infrastructure Programme (LACIP)	N/A
133	Transport	Peru – South America	Expansion of Lima International Airport	N/A
134	Transport	Angola – Southern Africa	Rehabilitation of road EN140 between Mussende and Cangandala	N/A
135	Transport	Brazil – South America	Ports infrastructure	LAC GGIA
136	Transport	Mexico – Central America	Establishment of a maritime corridor between the Portuguese Port of Sines and the Mexican Port of Coatzacoalcos and the interoceanic Corridor of Tehuantepec	Contributes to LAC GGIA and to the Interoceanic Corridor at the Isthmus of Tehuantepec
137	Transport	Chad – Western Africa	N'Djamena Airport	N/A
138	Transport	Peru – South America	Metroline 2 in Lima	N/A

Source: Council of the European Union, 21 November 2023.[332]

Annex 3
Global Gateway projects analysed in the report

The projects in bold are the 25 projects that benefit at least one European company.

1. **Just Energy Transition Partnership with Vietnam**
2. **Just Energy Transition Partnership with Indonesia**
3. Just Energy Transition Partnership in Senegal
4. **Just Energy Transition Partnership in South Africa**
5. Green Energy Transition in Bangladesh
6. **Upgrade of large-scale solar power plant and photovoltaic mini-grids by the West African Power Pool in Benin**
7. **Development of solar power plant in Boundiali and Serebou and extension, reinforcement, and upgrading of networks in Ivory Coast**
8. **Construction of hybrid and solar power plants and extension of the energy network in Niger**
9. **Construction of solar/diesel hybrid power plant in Niger – cancelled**
10. **The HARU ONI project in southern Chile to produce carbon-neutral fuels using wind energy**
11. **Construction of Pump and Storage Facility in Santiago island in Cape Verde**
12. Development of Gran Chaco and expansion of the electricity transmission network covering 23 provinces nationwide in Argentina
13. **Construction of about 150 small photovoltaic-hybrid mini-grids in Nigeria**
14. **Construction of 85 MW solar PV plant combined with electrolysers in Namibia**
15. **Developing Chile's green hydrogen potential**
16. Financial platforms for green hydrogen in South Africa and Namibia
17. Construction of hydrogen power plant in Morocco
18. Develop green hydrogen in Mauritania and accelerate its energy transition
19. **Production of green methanol for shipping in Egypt**
20. **Bio2Watt plants expansion in South Africa: producing biogas from animal waste and other waste sources**
21. **Geothermal Project TMGO in Ethiopia**
22. Construction of Ruzizi III hydropower plant for the Democratic Republic of the Congo, Rwanda, and Burundi
23. **Solid waste management (La Duquesa Dump) in Dominican Republic**
24. **Cleanup of Hann Bay (Dakar) in Senegal**
25. Reduce chronic water shortages and improve wastewater systems in Barbados
26. Growing the Great Green Wall
27. Sustainable and social urban housing: facilitate access to adequate housing for low-income families in Peru (Fondo MiVivienda project)
28. Mortgages for new housing units with improved energy efficiency standards in Peru under Ecovivienda Programme
29. **The Lobito Corridor: Connecting the Democratic Republic of the Congo and Zambia to global markets via Angola**
30. Critical raw materials (CRM) Partnership Roadmap in Rwanda, Tanzania, Uganda, and Zambia
31. Algeria, Egypt, Morocco, and Tunisia – Medusa optical fibre cable
32. Data Governance: development of data policy frameworks and data use cases, and identification of investments in green and secure data infrastructure in sub-Saharan Africa
33. **Construction of data centre in Nouakchott and submarine cable in Mauritania**
34. **MAV+ in Southern Africa: Rwanda, Senegal, and Ghana**
35. **Implementation of partnership with Kazakhstan on raw materials, batteries, and renewable hydrogen**
36. **Strategic Partnership on Critical Raw Materials in Democratic Republic of Congo**
37. **Chile – local value chains for Critical Raw Material**
38. **Argentina – developing the sustainable lithium value chain in the Salta and Jujuy provinces**
39. Implementation of partnership on raw materials value chains and renewable hydrogen in Namibia
40. Power-to-X (P2X) hydrogen power reference plant in Morocco (Public-Private Partnership, PPP)

Annex 4
Companies directly represented in the Business Advisory Group benefitting from Global Gateway projects

Moller Maersk

Enel

Meridiam

Orange

Nokia

Total Energies

Siemens

Endnotes

1 Ursula von der Leyen (2024) Europe's choice: political guidelines for the next European Commission 2024-2029 (Strasbourg, 18 July 2024). https://commission.europa.eu/document/download/e6cd4328-673c-4e7a-8683-f63ffb2cf648_en?filename=Political%20Guidelines%202024-2029_EN.pdf
2 European Commission (2021) Joint communication to the European Parliament, the Council, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank: The Global Gateway. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52021JC0030
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About Counter Balance

Counter Balance is a coalition of 9 NGOs whose mission is to make European public finance a key driver of the transition towards socially and environmentally sustainable and equitable societies.

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