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## **Learning from the Competition – China's, Japan's and the EU's Infrastructure Connectivity Rule Setting in Asia**

Caixia Mao (Institute for Global Environmental Strategies, IGES,  
Hayama, Japan)

Lukas Maximilian Müller (University of Erfurt, Germany)

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Caixia Mao (Institute for Global Environmental Strategies, IGES, Hayama, Japan)

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*Series Editors*

Jürgen Rüländ, Judith Schlehe, Günther Schulze,

Stefan Seitz

## **Abstract:**

*In the race for infrastructure connectivity across Asia, several states have established initiatives to provide funding for developing countries. Chief among these are the Chinese Belt and Road Initiative (BRI) and the Japanese Partnership for Quality Infrastructure (PQI). The most recent addition to these competing multilateral initiatives in connectivity is the European Union's 2019 policy guideline “Connecting Europe and Asia: Building blocks for an EU Strategy.” Existing analyses have identified geopolitical competition as the driver behind these competing initiatives. In this paper, we propose an alternative explanation. Assessing the incremental design of China’s, Japan’s and the EU’s connectivity strategies, we find evidence that policy learning is taking place among the three actors. In competitive rule setting for Asia’s infrastructure connectivity, China has acted as the first mover, followed by Japan and the EU. We distinguish between support to infrastructure connectivity along four dimensions: (1) the breadth of their infrastructure support, based on the actors’ definitions; (2) the comparative advantage the support is based on; (3) the character of resources provided; and (4) the degree of bilateralism/multilateralism.*

## **Keywords:**

*Infrastructure Connectivity, China, Japan, European Union, Political Learning*

## **Authors:**

*Caixia Mao is a researcher at the Institute for Global Environmental Strategies (IGES), Hayama, Japan. Lukas Maximilian Müller was a researcher at the Department of Political Science at the University of Freiburg until October 2019 and is currently a researcher in Comparative Government at the University of Erfurt.*

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# 1. Introduction

In Asia, a race for infrastructure development is under way involving the more developed Northeast Asian countries as well as the developing countries in Asia's various sub-regions. Current efforts to expand regional linkages are being discussed under the relatively new term of "connectivity," which suggests a broader effort to link institutions and people, but in reality often disguises a more narrow transport infrastructure agenda. Over the past decade, due to a combination of investment gaps in infrastructure in Asia's developing countries, industrial overcapacity in some more developed Asian countries, and persistent sluggish economic growth in others, a variety of countries, most notably China and Japan, have begun to aggressively finance infrastructure linkages.

Perhaps the most well-known scheme is China's Belt and Road Initiative (BRI), adopted in 2013 with a presumed but opaque budget of US\$1 trillion and an even less transparent set of political and economic objectives. Another notable initiative is Japan's Partnership for Quality Infrastructure (PQI), adopted in 2015 with a US\$110 billion budget that was later expanded to US\$200 billion. Subsequently, other initiatives were established, including South Korea's New Southern Policy, India's Act East Policy, and strategies by the United States (US) and the European Union (EU).

Focusing development assistance on infrastructure connectivity is not an altogether new phenomenon. Hence the current drive in Asia represents a novel case of a familiar phenomenon. Already in the 1950s and 1960s, infrastructure development was viewed as the key requisite for economic modernization and development. European states and the United States as well as the Bretton Woods institutions supported infrastructure development abroad in connection with their expansion to foreign markets. The questionable results of these initiatives, including marginalization of affected stakeholders and democratic deficits, environmental degradation (Rüland 2019), and ultimately disappointing economic dividends, gradually prompted a readjustment of policies by Western donors. With the rise of the Asian developmental state in the 1970s and 1980s, these issues re-emerged, with Japan in particular recognized as an infrastructure provider in support of its external trade (Jiang 2019). Following its post-1990 economic stagnation and a relative slump in infrastructure modernization initiatives, Japan's infrastructure-based approach to development has resurfaced in recent years. This development has been characterized, among other ways, as a reaction to China's growing role as a provider of infrastructure connectivity in Japanese export markets. For this reason, China must be regarded as the first mover in the current drive for infrastructure modernization across Asia.

The competing connectivity initiatives appeal to the leaderships of developing countries across Asia due to their persistent problems in procuring external resources for domestic infrastructure expansion as well as their concomitant political strategy to build up large-scale infrastructure projects in a quest for domestic legitimacy, as recently seen in India, Indonesia, the Philippines, but also in Iran, Kyrgyzstan, and Tajikistan. The Asian Development Bank (ADB) has identified huge infrastructure financing needs across Asia's sub-regions, estimating an average annual investment gap for the period from 2016 to 2030 of US\$33 billion for Central Asia, US\$919 billion for East Asia, US\$365 billion for South Asia, and US\$184 billion for Southeast Asia (Asian Development Bank 2017). While East Asia possesses states and institutions capable of meeting these needs, Asia's other sub-regions

such as Central, South, and Southeast Asia stand out for their problems in mobilizing adequate investment. Some sub-regions have undertaken efforts to set an agenda and to mobilize resources for their infrastructure development, for instance the Association of Southeast Asian Nations (ASEAN) (Müller 2020), but most regions continue to be overwhelmingly dependent on the connectivity schemes created by China, Japan, and other actors.

The proliferation of competing institutional orders in the policy area of infrastructure connectivity is reflective of the phenomenon that scholars have labeled “multilateralism 2.0” or “contested multilateralism” (He 2019). Over the past two decades, the realms of trade and security have both seen the emergence of alternative institutional frameworks backed by great powers as an extension of their political and economic interests (Gill & Green 2009; He 2019). It is clear that infrastructure connectivity is another realm in which such a contested institutional order is emerging. The current challenge for developing countries in Asia is to avoid having their priorities usurped by these connectivity initiatives. While some projects are supportive of regional priorities, BRI, PQI and other emerging schemes are obviously in pursuit of idiosyncratic geo-political and geo-economic objectives (Grimes 2016).

Why did these competing connectivity initiatives emerge and what drives them? Existing literature primarily focuses on the role of strategic competition in the emergence and design of such initiatives (Baldwin 1993; Ravenhill 2010; Jiang 2019). Explanations offered by scholars include strategic uncertainty, the shock of the Global Financial Crisis (He 2019) and shifts in the regional order (Bisley 2019). Rüländ’s (2019) work in addition suggests that in the case of connectivity, China and, to a lesser degree, Japan have consciously uncoupled their strategies from best practices of development with the objective of establishing institutional alternatives away from the multilateral mainstream.

In this paper, we propose an alternative theory: While we acknowledge that strategic competition remains key for the emergence and persistence of these competing initiatives, the different actors involved in connectivity provision in Asia are learning from one another and incrementally design their strategies based on lessons derived from previous initiatives. This study will focus on the incremental design of two of the most well-known connectivity initiatives and one lesser-known one: the Chinese Belt and Road Initiative, the Japanese Partnership for Quality Infrastructure, and the European Connecting Europe and Asia Strategy.

The establishment of competing connectivity initiatives is particularly interesting due to the competitive rule setting that is taking place. The schemes espoused by China, Japan, and the EU all represent different sets of rules regarding infrastructure connectivity, which have repercussions on which standards are applied in the establishment of infrastructure links, including their planning, their financing, and their use. As external support contributes to divergent projects, it also solidifies divergent views of connectivity. In this paper, we will highlight that these purportedly competitive initiatives are not only built on competition but also on processes of political learning. In certain respects, rule setting in Asian connectivity support is therefore more convergent than is commonly appreciated by contemporary scholarship.

In the following section (2), we outline the successive nature of the Chinese, Japanese, and European connectivity initiatives. In section 3, we elaborate our theoretical framework,

consisting of an organizational competition and policy learning perspective. In section 4 we illustrate political learning in the incremental design of China's, Japan's, and the EU's connectivity strategies. The paper concludes with section 5.

## **2. Competing Initiatives in Asian Connectivity – the Cases of China, Japan, and the EU**

It was China's launch of the Belt and Road Initiative in 2013 that permanently transformed the strategic landscape of external connectivity support to Asian developing countries. Although the BRI program has no official budget or clear list of priorities, its impact has been widely felt. This is visible in the successive strategies by other actors, which are all clearly influenced by the Chinese experience. All post-2014 strategies are as much characterized by the comparative advantages they espouse as by the way they differentiate themselves from the Chinese approach. China's approach, widely characterized as defined by bilaterally negotiated projects aiming for rapid construction of infrastructural links, funded through state-owned companies, has become the rule-setting archetype against which later infrastructure strategies measure up. This is particularly visible in two of the most significant infrastructure connectivity strategies, the Japanese Partnership for Quality Infrastructure and the European Connecting Europe and Asia Strategy.

The Japanese government announced its Partnership for Quality Infrastructure in 2015, which later became a part of its Free and Open Indo-Pacific (FOIP) strategy. At the launch of the US\$200 billion strategy, Prime Minister Shinzo Abe emphasized Japanese companies' commitment to "quality" (Abe 2016), clearly with reference to what has been perceived as a lack of quality in China's "rapid" construction approach. Japan defines connectivity with a particular emphasis on the rule of law, inclusion, and transparency (Ministry of Foreign Affairs of Japan 2018), highlighting further divergences from the Chinese position. The emphasis on the rule of law in particular should be interpreted as a critique of China's non-transparent approach to project preparation under the BRI.

At the same time, however, economic and geopolitical stability appear to have similar weight in both Chinese and Japanese initiatives. The strategy prominently mentions economic prosperity, and peace and stability as key objectives (Ministry of Foreign Affairs of Japan 2018), reflecting contemporary Chinese rhetoric on infrastructure connectivity as a pathway to broader development. Two characteristics of the Japanese approach to connectivity are drawn – or, more appropriately, learned – from China's experience with the BRI. The first is the definition of connectivity as an "international public good," echoing Chinese rhetoric of infrastructure as a "win-win" proposition and a precondition for more ambitious economic development objectives. In addition, Japan leans on China's specification of countries to be included or excluded in connectivity initiatives based on pre-defined corridors. Another similar characteristic between Japanese and Chinese support is their bilateral nature, neglecting regional dimensions of infrastructure connectivity such as the Master Plan of ASEAN Connectivity. This characteristic of Japanese support, however, precedes the Belt and Road Initiative (Müller 2020). From these examples, it is clear that the Japanese approach to Southeast Asian connectivity may only be fully understood by considering competition with and learning from China.

In 2016, one year after the unveiling of the Japanese connectivity strategy, and three years after the Chinese BRI launch, the EU made its first moves in Southeast Asian infrastructure connectivity. Pushing the concept in multilateral meetings, primarily the Asia-Europe Meeting (ASEM), as well as bilateral relations with ASEAN, the EU has since attempted to lodge itself in the constellation of actors providing infrastructure connectivity across Asia. Compared to the Japanese and Chinese initiatives, however, the EU strategy remains relatively vague and still lacks clear financial commitments. The joint communication “Connecting Europe and Asia – Building blocks for an EU Strategy” was published by the European Commission and the European External Action Service and is hence not yet a full-fledged EU strategy. Still, certain similarities and differences to the Japanese and Chinese strategies are already apparent. While the document refrains from addressing distinct regions or actors within Asia, it is clear it addresses Northeast Asia, with China mentioned seven times and Japan named four times within the document. The EU defines connectivity as “sustainable,” “comprehensive,” and as based on international rules.<sup>1</sup> The sustainable dimension of the strategy addresses stronger environmental and social controls for potential projects. This is an opaque reference to what is perceived as an overly narrow, hard infrastructure-based perspective taken on connectivity by China and Japan (Rüland 2019). The rules-based dimension of the EU’s strategy makes particular reference to rules and regulations aiming to ensure a “level playing field” for businesses. Again, this is clearly in opposition to what has been perceived as insufficiently competitive procurement practices by China and possibly Japan. Looking at current support to ASEAN in connectivity, it is clear that the EU approach differs completely, with its cooperation focusing more on regional institutions and targeting regulatory reform rather than physical infrastructure links.

Despite these differences, some similarities to the previous strategies by China and Japan can be pointed out. First of all, the establishment of a European connectivity strategy aimed at Asia is a result of geopolitical learning, with the organization insisting until 2018 that it did not necessarily need to expand its engagement in connectivity.<sup>2</sup> The fact that the EU has come around to adopting a connectivity strategy is testimony to the fact that lessons have been drawn from China and Japan. In the document itself, two similarities to China’s and Japan’s approach can also be identified. First, the EU borrows heavily from the prosperity narrative contained in Chinese and Japanese perspectives, which claim that connectivity enables broader economic development, although it emphasizes different factors contributing to this prosperity. Secondly, the CEAS contains a detailed disaggregation of potential physical transport links, including rail, road, air, and sea transport. Such a focus on physical links is unprecedented in EU strategies towards Asia and reflects a certain degree of policy learning from its competitors.

Both of these cases point towards two things: First of all, both Japan and the EU view China as the first mover in external support in Southeast Asian connectivity. While this is not strictly true, with Japan having a long history of infrastructural support to Southeast Asia (Zhao 2018), China’s Belt and Road Initiative nonetheless is the first case of a large-scale,

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<sup>1</sup> European Commission “Connecting Europe and Asia – Building blocks for an EU Strategy,” 19 September 2018, available at: [https://eeas.europa.eu/headquarters/headquarters-homepage\\_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy](https://eeas.europa.eu/headquarters/headquarters-homepage_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy), (accessed 15 May 2020).

<sup>2</sup> European External Action Service official, personal communication, 14 February 2018.

coordinated and, most importantly, widely publicized infrastructure drive in the region. Secondly, both Japan as well as the EU explicitly or implicitly refer to China in their strategies on infrastructure connectivity. This is particularly visible in how they approach connectivity in the four dimensions analyzed within this paper: (1) the breadth of their infrastructure definition; (2) their comparative advantage in providing support; (3) the character of resources provided; and (4) the degree of multilateralism contained in their support. Based on the four dimensions, we analyze how the three countries attempt to promulgate a set of rules in infrastructure connectivity. Japan differentiates from the Chinese approach of bilateral state-led support with its claim to quality. The EU, meanwhile, differentiates from the Chinese approach of rapid infrastructure build-up with claims of social and environmental sustainability.

We argue that these differences emerge not only as a result of inter-actor competition, but due to policy learning on the part of Japan and the EU, based on China's experience as the first mover. The successive nature of the emergence of China's, Japan's, and the EU's infrastructure connectivity fulfills the basic requirements under which policy learning may occur: China's BRI has been in action for several years, enabling external actors to draw lessons from its functions and effects. In addition, Chinese, Japanese, and European policy makers have regularly interacted on connectivity in multilateral and bilateral political summits, providing opportunities for an exchange of experiences and learning lessons.

### **3. Theoretical Framework**

To explain the effect of inter-actor competition and policy learning, we employ an inter-organizational framework of analysis. An emerging line of inquiry (Biermann 2011), inter-organizational relations has recently garnered more scholarly attention due to increased awareness of the effects of relations between organizations. Based on this theoretical approach, organizations are not isolated entities subsisting on their own resources but instead are involved in resource exchanges with other organizations in their environment, resulting in mutual constitution (Brosig 2011). Relations between organizations may have a profound effect on the institutional development of the entities involved through dynamics of resource exchange, organizational networking and processes of institutional socialization (Franke 2017). While this study deals with states as the objects of analysis, the causal expectations of inter-organizational theory remain true. States compete and learn from one another under the same conditions as organizations do. Multi-actor interplay in infrastructure connectivity has not received much attention from scholars, which is a general phenomenon across policy areas (Brosig 2011). The majority of analyses remain focused on dyads, such as the ASEAN-China relationship (Sevilla 2017) or competition and collaboration between China and Japan (Zhao 2018; Jiang 2019). To fill this particular gap in the case of infrastructure connectivity in Asia, this paper will provide a novel contribution by contrasting the strategies of three actors through the theoretical lens of political learning as opposed to strategic competition.

According to inter-organizational theory, interplay between organizations comes about due to the inability of organizations to provide necessary resources internally, which leads to the emergence of external dependencies (Biermann & Harsch 2017; Brosig 2011; Pfeffer & Salancik 1978). This resource dependence is what draws China, Japan, and the EU into the

orbit of infrastructure connectivity in the case of ASEAN (Müller 2020) as well as other Asian sub-regions. Since external actors vie for influence in these sub-regions, competition emerges between them (Rüland & Michael 2019).

The reason that China, Japan and the EU compete in their ability to support Asian countries in establishing infrastructural connectivity links is due to the geopolitical leverage thought to be attached to such resource exchange relationships. Scholarship on resource dependence has shown that relationships may be instrumentalized by actors providing resources in cases of power differentials (Pfeffer & Salancik 1978). This means that conditions such as particular policy propositions or solutions may be tied to the resources that are transferred. This is what explains actors' interest in providing resources to infrastructure connectivity, since strong financial, technical, or political links may enable them to attach conditions to their support later in the process.

Inter-organizational theory has found that competitive environments lead to a specialization of organizations, which seek to occupy niches (Brosig 2011). This specialization is thought to be connected to the variation and intrinsic capabilities of actors within a network, as they are built on pre-existing comparative advantages (Brosig 2011). Little is still known about the processes through which political actors become specialized, i.e. how specialization choices are taken within entities (Biermann & Harsch 2017; Brosig 2011). We believe that competition and recourse to a given entity's comparative advantages is a significant contributor to specialization between actors. This perspective hence represents the first feature of our analysis.

The second element of our theoretical framework concerns the phenomenon of policy learning (Bennett & Howlett 1992). Known as policy-oriented learning (Sabatier 1988), lesson-drawing (Rose 1991), or government learning (Etheredge & Short 1983), all these concepts denote the same principle: the transfer of knowledge from one policy-making process to another. According to Hall, policy learning may be understood as a "deliberate attempt to adjust the goals or techniques of policy in the light of the consequences of past policy and new information so as to better attain the ultimate objects of governance" (Hall 1988: 6). In this case, we are specifically interested in learning processes that occur between entities, as opposed to within a single one. True to Hall's definition, however, the learning does take place over time, across the strategies of China, Japan, and the EU.

Both successful as well as unsuccessful policies can serve future learning processes (May 1992). Policy learning takes place within the parameters of the policy in question, i.e. it influences specific characteristics of a policy strategy. In order to address the crucial features of policy learning in infrastructure connectivity, we assess the policy dimensions that have been highlighted in comparative studies on infrastructure connectivity support (Hillman & Yayboke 2019; Wilson 2019a). The four dimensions analyzed are (1) breadth of the actors' infrastructure connectivity definition; (2) actors' fundamental comparative advantages in infrastructure connectivity; (3) the character of resources provided; and (4) the degree of bilateralism and multilateralism in providing support.

Dimension 1 refers to differences in what infrastructure connectivity is thought to consist of. As we have highlighted in our introduction, China, Japan, and the EU differ significantly in how they operationalize connectivity. Not all strategies are equally specific in their objectives, with China's BRI not publicly tied to a particular definition of what infrastructure



connectivity should consist of. Japan and the EU, meanwhile, have designated specific definitions for what they consider infrastructure connectivity to be. In this study we will assess the breadth of the connectivity definition applied by the actors.

Dimension 2 is based on the comparative advantages of the three actors. China is known for its own rapid and expansive infrastructure build-up carried out by Chinese state-owned enterprises, backed by state-led financial institutions. Japan, in turn, is distinguished by its experience in providing infrastructure to developing countries, an activity it has carried out since the 1980s. The EU bases its connectivity support on its experience of regulatory convergence under the common market. In this study we will assess the comparative advantages that the actors' connectivity support is based on.

Dimension 3 highlights the nature of resources provided. While China and Japan excel primarily through their provision of official development assistance and foreign direct investment to infrastructure projects (Wilson 2019a), the EU has so far distinguished itself rather as a provider of technical cooperation in regulatory reform. China has been particularly noted for its use of physical resources, including Chinese enterprises (Sevilla 2017) and Chinese labor. Through its focus on standardization in infrastructure provision, Japan appears to occupy something of a middle ground between China and the EU. In this study we will assess the nature of the resources provided by the actors.

Dimension 4, the degree of multilateralization of support, is likely one of the most noted differences in support for infrastructure connectivity. Following the establishment of the BRI, much has been made of China's bilateral negotiation of projects as well as the build-up of alternative financial institutions such as the Asian Infrastructure Investment Bank (AIIB). While Japan and the EU have defined their support in opposition to bilateral modes of governance, China has in fact itself moved away from bilateralism. At the same time, contemporary Japanese strategy also reflects aspects of bilateralism that appear to have been learned from China (Jiang 2019). In this study we will investigate the degree of multilateralization of connectivity support by the actors.

These four dimensions provide the framework around which we build our analysis of competition and policy learning between China, Japan, and the EU. Through closer analysis of the four dimensions, this paper argues that the three actors all aim to establish rules for infrastructure connectivity. This is possible due to the absence of rules provided by sub-regional actors across Asia.

## **4. The Incremental Design of Infrastructure Connectivity Strategies**

### *4.1 China as a First Mover*

Southeast Asia was in fact one of the first venues in which China's twenty-first century infrastructure drive was announced. The initiative of the twenty-first Century Maritime Silk Road was initially proposed by President Xi Jinping during his visit to Indonesia in 2013 (Chinese Ministry of Foreign Affairs 2013).<sup>3</sup> In its public rhetoric then and now, China has

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<sup>3</sup> Chinese Ministry of Foreign Affairs (2013) "习近平在印度尼西亚国会的演讲 (全文) —中华人民共和国外

consistently emphasized the multi-dimensional nature of its connectivity definition, including physical infrastructure links, trade relations, financial cooperation, and people-to-people exchanges.<sup>4</sup> In the public eye, however, many of the dimensions purportedly included in Chinese connectivity efforts have flown under the radar, given the immensity of the physical projects carried out and the vagueness and lack of transparency of the parallel initiatives.

China's comparative advantage is related to its national development experience, based on the rapid establishment of physical infrastructure using Chinese industry, funded by state-led financial institutions. Many authors have studied the "developmental state" characteristics of the Chinese model (Jiang 2019; Rüländ 2019). China's advantage lies in its possession of capital, labor, and an integrated institutional landscape allowing rapid action in infrastructure project planning and execution. Other domestic factors considered responsible for driving its connectivity strategy include the overcapacity of its iron, steel, aluminum, and cement industries (Sevilla 2017; Zhao 2018), the necessity of structural economic change, forcing some local or provincial level governments to aim for export-oriented growth (Yoshikawa 2016), the objective of boosting the development of less developed regions in South and Western China (Zhao 2018), and the attempt to divest itself from its US currency reserves and other security bonds (Karim 2015). With regard to how this economic expansion affects Asian developing countries, authors have criticized China for its extreme market expansion (Yoshikawa 2016), as well as its attempt to secure routes for the transport of natural resources (Sevilla 2017).

The type of support China provides is primarily notable for its strong reliance on state-led foreign direct investment. The BRI entails hard infrastructure development on a massive scale, including high-speed railways, highways and track roads, air and sea ports, energy infrastructure, and large industrial and special economic zones. In infrastructure, it aims to develop a Pan-Asia Railway Network with three 4,500-5,500 kilometer railways lines linking, for instance, China and Southeast Asia (Zhao 2018). Chinese support in infrastructure connectivity has been described as "pragmatic" (Yu 2017), distinguishing it from the approach taken by existing multilateral development banks and international financial institutions such as the International Monetary Fund (IMF) and the World Bank. In fact, the type of support China provides is heavily inspired by Japanese export promotion practices up until the 1980s, prior to its integration into the Western development cooperation architecture (Jiang 2019). While Western institutions have increasingly moved towards the position that good political governance is a prerequisite for market operation (Ake 1993), China has taken a more apolitical approach, providing significant funding regardless of host countries' political regimes. Scholars have commented on the anachronistic nature of Chinese support, reflecting relatively dated paradigms of the developmental state and apparently ignoring more recently established best practices in development assistance (Rüländ 2019). While it is legitimate to claim that China, and by association, large swaths of Asia, subscribe to development paradigms that have fallen out of fashion, there are alternative explanations for why China is providing this type of support. On one hand, the

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交部," available at: [https://www.fmprc.gov.cn/web/ziliao\\_674904/zyjh\\_674906/t1084354.shtml](https://www.fmprc.gov.cn/web/ziliao_674904/zyjh_674906/t1084354.shtml), (accessed 4 May 2020).

<sup>4</sup> *Associated Press*, 9 November 2014.

Chinese developmental state continues to be recognized in many Asian states. In addition, the relative withdrawal of Western actors in the provision of infrastructure connectivity throughout the 1990s and the 2000s (Jiang 2019) may have created a vacuum, which was then filled by China. Due to its lack of participation in multilateral forums such as the World Trade Organization (WTO) until recently, it is possible that China has been deprived of lesson drawing from Western experiences of development. On the other hand, the Chinese approach may represent a conscious “un-learning” of Western experiences of development.

Notwithstanding the fact that multilateralism is encouraged in the Chinese government’s official policy documents, its approach in infrastructure connectivity has primarily been reliant on bilateral negotiations, following a much-noted “win-win” rhetoric. This has been apparent in China’s dealings with Indonesia, which have tied in with Indonesian national strategies (Zhao 2018). In general, China has remained agnostic to the popularity or potential value-added of connectivity initiatives that it funds abroad, which has led to criticism that China is funding “white elephants.” This lack of multilateral control of projects and a neglect of project pre-assessment by private sector actors is also reflective of China’s bilateral approach to infrastructure connectivity. Instead, other priorities have steered the negotiation of projects. Authors have noted the role of the BRI in supporting China’s attempt to rebalance geopolitical influence away from the US (Zhao 2015), to establish a parallel system of multilateral financial institutions (Yu 2017), and to expand the use of the Renminbi through financial cooperation with third countries (Karim 2015).

As the first mover in Asia’s current infrastructure connectivity drive, China’s approach has faced harsh criticism from policy makers and scholars, particularly related to the speed and scale of its infrastructure build-up. Major lines of criticism of China’s support include the use of interdependence as a means to re-establish a Sino-centric regional order (Akimoto 2018), to export China’s developmental paradigm as a sort of “Chinese Dream” (Yoshikawa 2016), to seek geopolitical hegemony (Umbach 2019), or to export a state-led authoritarian developmental model. More concretely, authors have criticized China for moving countries into unsustainable debt traps, for contributing to corruption, for neglecting the creation of local jobs and economic value-added and for foregoing socio-environmental considerations in its projects (Rüland 2019). Such scholarly criticism has tied in with rising criticism in host countries of Chinese-led projects, particularly their implementation modalities and funding arrangements (Mendoza 2018). Many of the presumed failings of Chinese infrastructure connectivity support, however, may be due to its role as a first mover. Indeed, similar criticism has previously been directed at Western financial institutions such as the International Monetary Fund and the World Bank (Bond 2004; Buirra 2005; Escobar 1995; Stiglitz 1998b, 1998a; Wahi 2005). This suggests that early movers in a particular policy area or representing a particular form of support may fail in their policies, providing a template for policy learning for the early mover as well as for other actors. China’s attempt to provide rule setting for infrastructure connectivity certainly leaves room for improvement, by itself as well as by other actors. Claims of Chinese resistance against multilateralizing its project preparation processes or readjusting its priorities may be overstated, however, given the degree to which certain BRI institutions have been multilateralized, taking into account the priorities of external actors (Wilson 2019b).

Indeed, the establishment of the BRI as China’s contribution to global connectivity development could be seen as its attempt to occupy a niche based on its comparative

advantages (Brosig 2011) as an emerging power engaging in a pragmatic form of development cooperation. Amid the vacuum created by the decline of the neoliberal economic model due to the global financial crisis (Jiang 2019) and yet without a proven model of success in international development, Chinese efforts reflect a trial and error process in the arena of infrastructure connectivity support (Rüland 2019). This distinction of Chinese support may reflect a conscious decoupling from Western approaches, aimed at separating itself from the established landscape of international financial institutions and multilateral development banks. In our opinion, however, this approach at least partly reflects a Chinese-driven learning process, based on different cognitive priors (Acharya 2010) than pure opposition to Western development cooperation norms. Frustrated by what were seen as constraining rules and practices by such institutions and veto positions by influential Western states, China has moved towards developing a set of alternative rules to fund infrastructure connectivity. From its own vantage point, China has countered empty Western rhetoric and a lack of proactivity with its pragmatic approach to connectivity support.

It is easy to criticize China for its failings in BRI as well as its national interests masquerading as multilateral concerns. On the other hand, China’s choices in designing its connectivity schemes are based not only on opposition to Western conceptions of development support, but also on selective lesson-drawing from the experiences of other actors in development, for instance Japan (Brautigam 2009; Jiang 2019) and multilateral institutions (Wilson 2019b). We believe that China’s engagement has not only undermined existing notions of best practice in connectivity development (Rüland 2019), which were perhaps never quite as established in practice as they seemed. In addition, the Chinese initiative has opened up conceptual discussions on development from which a multitude of actors may benefit. As the Japanese experience shows (Jiang 2019), Western notions of development cooperation have always sat uneasily with some Asian countries. A renegotiation of a Western development consensus may benefit developing countries by enabling them to assert their own rules, thanks to the spaces opened by the debates around Chinese engagement, both within the Chinese institutional order as well as within multilateral institutions.

**Table 1: China’s approach to infrastructure connectivity**

| Definition  | Comparative Advantage   | Character of Resources  | Multilateralization  |
|---|---|---|--|
| Lacking clarity; flexible; “win-win”; basis for economic prosperity | Chinese development experience, rapid build-up of physical links; state-led institutions; flexibility and pragmatism; endowment with financial, material, and labor resources | Financial; material, labor; pragmatic, apolitical approach; state-led | Bilateral, but moving towards multilateralism; establishment of new institutions |

Source: Authors

China has also shown responsiveness to criticism of its rule setting in infrastructure connectivity. Pressure from the Japanese Partnership for Quality Infrastructure as well as from other actors has prompted continuous policy learning. The latest BRI Action Plan (2018–2030) (One Belt One Road Portal 2018) emphasizes the standardization of projects – an aspect usually prioritized by Japan. Concerns such as energy preservation, environmental protection, and sustainable finance are all more deeply considered in contemporary BRI

projects. At its recent second BRI Forum, China also announced measures to cooperate more closely with multilateral financial institutions, agreed to set up an arbitration panel for controversial projects, and devised monitoring and evaluation mechanisms to enable continuous policy learning. Thus China is aware of the critiques emanating from observers and is taking the views of external actors into consideration for future iterations of its infrastructure connectivity policies.

#### *4.2 Japan's Partnership for Quality Infrastructure*

Japanese involvement in developing Asian infrastructure connectivity goes back as far as the 1990s, when the Japanese state sought to support its companies by developing infrastructure networks for the production and transport of goods (Zhao 2018). Similar to China, Japanese support in connectivity has traditionally focused on physical infrastructure development, with the aim of promoting industrialization (Kimura et al. 2010). Unlike China, however, Japan did not put its connectivity support under a single umbrella term. This happened only in 2015, with the establishment of the Partnership for Quality Infrastructure. Although the launch of the PQI could be interpreted as the compilation of previously existing Japanese support activities in Asia and beyond (Thankachan 2017), the rhetorical framing of the PQI has widely been viewed as a reaction to China (Li & Taube 2019).

At its launch, the PQI was based on a connectivity definition encompassing four pillars: (1) the expansion and acceleration of development cooperation; (2) stronger collaboration with the ADB; (3) an increase of funds to protect investors against risks in international projects; and (4) the promotion of quality infrastructure as an international standard (Japanese Ministry of Foreign Affairs 2015). In particular, the quality dimension of Japanese infrastructure connectivity support was defined in implicit opposition to China, which is portrayed as providing relatively low-quality solutions. Following the establishment of Japan's larger Free and Open Indo-Pacific Strategy in 2017, the PQI became a policy pillar, contributing to the provision of public goods by Japan to ensure peaceful cooperation in the Indo-Pacific. Ironically, this rhetoric is so close as to be almost indistinguishable from Chinese BRI rhetoric. Nonetheless, Japan's definition of infrastructure connectivity was defined in contrast to China's perceived attempts to revive its historically dominant position in East Asia (Akimoto 2018). The mention of "openness" and "inclusivity" in Japan's regional strategy may be seen as a reaction to its exclusion in China's pre-determined routes of "participating countries" under the BRI.

Japan's comparative advantage in infrastructure connectivity primarily lies in its technological cachet and the competitiveness of its national companies. It has been argued, however, that the Japanese advantage in some infrastructural departments, for instance in high-speed rail, has been tempered by China's technological progress (Zhao 2018). Still, Japan possesses some technological advantages, including economic efficiency, low lifecycle costs, a high degree of operational safety, resilience against natural disasters, comparatively greater consideration of environmental and social impacts, and a higher contribution to local society and economy. Finally, Japanese support, similar to that of China, is notable for its sheer size. In 2018, Japanese development assistance to Southeast Asia alone was larger than German development assistance worldwide.

In terms of the type of support provided, however, Japan operates similarly to China. It provides support to physical infrastructure development rather than the solely technical or regulatory cooperation provided by many Western development actors. The primacy of capital in Japan's approach to infrastructure connectivity is visible in its financial backing of the PQI. Its commitment of US\$110 billion almost perfectly mirrors the US\$100 billion China contributed to the AIIB as a part of the BRI (Li & Taube 2019). In contrast to the state-led financial mechanisms of China, however, Japan relies more heavily on its private sector (Ministry of Foreign Affairs of Japan 2016b), although those Japanese companies tend to closely align with their government. For this reason, the PQI has stressed the importance of public-private partnerships, supported by the Japanese government through the Nippon Export and Investment Insurance (Japanese Ministry of Foreign Affairs 2015). Policy learning is also apparent in how Japan has adapted its lending procedures. In 2015, when Japanese infrastructure connectivity support was criticized for its perceived sluggishness in contrast to Chinese speed and flexibility of disbursement, Japan was outbid by China in the case of the Jakarta-Bandung high speed rail project in Indonesia. In reaction, Japan quickly revised its loan procedure, reducing the period allotted for government deliberation and introduced exemptions for government guarantees if certain conditions are met by the recipients (Ministry of Foreign Affairs of Japan 2015; Jiang 2019).

The degree of multilateralization is likely where Japanese support differs most strongly from that of China. After gaining membership of the Organisation of Economic Co-Operation and Development's (OECD) Development Assistance Committee (DAC), Japan adopted a range of Western norms in providing development assistance (Jiang 2019). While Japan has since reverted to a more idiosyncratic approach, one of the primary objectives of the PQI remains the promotion of standards in infrastructure development, primarily through relations with multilateral development banks, particularly the ADB, which Japan dominates. Japan relies heavily on multilateral standards in its own strategies too. Its PQI is based on the G7 Ise-Shima Principles for Promoting Quality Infrastructure Investment, endorsed by the grouping in 2016 (Ministry of Foreign Affairs of Japan 2016a). In addition, Japan cooperates with other actors through its quadrilateral partnership with Australia, India, and the US, represented by the institutional structure of the "Blue Dot Network," which was established during the 2019 Indo-Pacific Business Forum. This mini-lateral cooperation has been seen as a reaction to the countries' exclusion from the BRI. This strategy clearly represents a case of rule setting, as the Japanese PQI as well as the ADB and the Blue Dot Network overtly promote the adoption of idiosyncratic standards, mainly related to notions of "quality" in infrastructure development.

It short, following China's rule setting relying on bilateralism, rapid state-led build-up of physical links and a pragmatic approach to funding infrastructure connectivity, Japan countered with a strategy of its own that is, however, strongly reflective of China's approach. In contrast to the BRI, Japan emphasizes the quality of its infrastructure support, remains committed to multilateral institutions, and emphasizes its use of the private sector. On the other hand, similarities remain between the two approaches. Japanese support to infrastructure connectivity remains primarily financial, with an emphasis on physical links rather than regulatory change in Southeast Asia. In addition, Japan also appears to follow a somewhat apolitical and pragmatic approach to the disbursement of funds. Jiang (2019) has convincingly illustrated that Japan has gradually returned to its earlier practice of utilizing

infrastructure for export promotion. As a consequence, Japan is arguably contributing to the revival of the developmental state model based on past economic development experiences (Rüland 2019). It is worth considering China’s influence as a trigger for Japan’s return to such a strategy following decades of hewing close to the Western development consensus.

All things considered, claims of pervasive strategic conflicts between Japan and China over infrastructure investment may be overstated. In recent years, a degree of cooperation has been apparent, culminating in ADB President Takehiko Nakao stating in 2017 that “we don’t need to regard the AIIB as a kind of rival, because there is a very large need to finance, so we can cooperate.”<sup>5</sup> The Japanese government has also expressed its willingness to cooperate with China’s BRI.<sup>6</sup> Noting Japanese choices in the type of support provided to infrastructure connectivity, it is also clear that a degree of learning has occurred between China and Japan. The gradual shift towards cooperation between the two historical adversaries is likely indicative of a mutual learning process.

**Table 2: Japan’s approach to infrastructure connectivity**

| Definition   | Comparative Advantage   | Character of Resources   | Multilateralization  |
|--|---|--|--|
| International public good; basis for economic prosperity | Technological leadership; economic efficiency; low lifecycle costs; operational safety, resilience against natural disasters; consideration of environmental and social impacts, high contribution to local society and economy | Financial; technological; private sector-driven; first more restrictive, now increasingly pragmatic and apolitical | Use of multilateral institutions, particularly ADB; endorsement of connectivity standards by multilateral forums |

Source: Authors

4.3 The EU’s Sustainable Connectivity Strategy

The EU’s moves towards a larger role in Asian infrastructure connectivity are considerably more recent than those of China and Japan. Although the EU has championed development cooperation as a foreign policy tool, infrastructure connectivity fell out of favor throughout the 2000s and 2010s due to what were perceived to be low economic benefits, democratic deficits, and corruption issues tied to large-scale infrastructure development. Until 2018, the EU appeared largely satisfied with its support to Asian connectivity, although occasional dialogues were held with Southeast Asian counterparts in 2014 and 2017. In 2018 the EU finally announced that it was developing a strategy to get more deeply involved in Asian connectivity. This plan, titled “Connecting Europe and Asia – Building Blocks for an EU Strategy” (Connecting Europe and Asia Strategy, or CEAS) was released in 2018.<sup>7</sup> While it is unquestionable that the West continues to propound its own development paradigm, it is

<sup>5</sup> *The Diplomat*, 11 May 2017.  
<sup>6</sup> *East Asia Forum*, 20 March 2018.  
<sup>7</sup> European Commission “Connecting Europe and Asia – Building blocks for an EU Strategy,” 19 September 2018, available at: [https://eeas.europa.eu/headquarters/headquarters-homepage\\_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy](https://eeas.europa.eu/headquarters/headquarters-homepage_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy), (accessed 15 May 2020).

clear that recent moves by the EU are tied to Chinese and Japanese moves in Asian infrastructure connectivity development.

The emergence of the European connectivity definition was a more multilateralized effort and hence took more time than the development of the Chinese and the Japanese strategies. To come up with a joint connectivity definition for Europe and Asia, the EU utilized the Asia-Europe Meeting (ASEM) as a clearing house. It first began discussions on a joint European-Asian connectivity definition at the 2016 ASEM Summit. A common connectivity definition was then adopted at the 2017 foreign ministers' meeting. It is fair to say that the EU struggled to push for its objectives in establishing a common definition for Eurasian connectivity. Comparing the European suggestion for connectivity and the definition ultimately adopted by ASEM (Table 3) highlights that connectivity remains a contested concept. In contrast to the proposal for multi-dimensional sustainability and international standards in connectivity activities by the EU, ASEM as a collective veered towards Asian rhetoric of "shared interests" and "mutual benefits" as the underlying principles of negotiations. While the EU proposal emphasized "consultation," the ASEM definition adopted a more pragmatic "result-oriented" approach. The initial European connectivity definition proposal was already reflective of Chinese and Japanese strategies in the region, visible in statements such as "connectivity must be defined broadly," referencing the multi-pillar nature of connectivity that is publicly espoused by ASEAN. The detailed elaboration of sustainability considerations is also a thinly veiled response to narrower Chinese and Japanese definitions of connectivity. This is already evidence of political learning on the part of the EU, establishing a definition in response to perceived failures on the Asian side. The apparent willingness of the EU to adopt the more pragmatic and result-oriented ASEM definition highlights a certain readiness to adapt to Asian conceptions of infrastructure connectivity.

More significant than this process, however, is the recent launch of the CEAS. Its connectivity definition reflects a European view of "sustainable, comprehensive and rules-based connectivity." It emphasizes particularly the regulation-bound nature of connectivity that the EU considers its own success story, and lists ambitions for more socially and environmentally sustainable connectivity. Interestingly, the document goes into significant detail regarding different aspects of physical connectivity. There are separate priorities listed for road, rail, sea, and air transport infrastructure. This is striking, as the EU has not distinguished itself as a supporter of such projects, at least not in Asia. The inclusion of such priorities is therefore likely a result of policy learning from Chinese and Japanese strategies. In any case, the new EU strategy marks a departure from engaging the East Asian region solely through multilateral forums, auguring a more bilateral and more financially significant involvement in connectivity. Interestingly, the publication of the EU Commission's connectivity strategy coincided with its strategic outlook on EU-China relations, which described China as a "systemic rival."<sup>8</sup> The EU's new approach marks the end of a withdrawn role for the EU and the beginning of open competition with other actors in Southeast Asian connectivity.

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<sup>8</sup> European Commission (2019) "EU-China—A strategic outlook," available at: <https://ec.europa.eu/commission/sites/beta-political/files/communication-eu-china-a-strategic-outlook.pdf>, (accessed 15 May 2015).



**Table 3: Comparison between the connectivity definition suggested by the European group to the 13th ASEM Foreign Ministers’ Meeting 2017 and the adopted definition**

| European Proposal   | ASEM Definition   |
|---|---|
| <p>“Connectivity is about bringing countries, people and societies closer together. It facilitates <b>free</b> access and is a means to foster deeper economic and people-to-people ties.</p> <p>In the ASEM context, Connectivity must be defined broadly – in both a geographic and functional sense – covering all three pillars of ASEM (economic, political/security and people-to-people contacts). Thus ASEM Connectivity covers both the ‘hard’ and the ‘soft’ aspects of linking Europe and Asia, including all modes of transport (land, sea and air) but also energy and digital links, higher education and research, as well as customs and trade facilitation.</p> <p>All Connectivity activities in ASEM must be in line with key principles and agreed international standards (<b>including labour, social and environmental standards</b>), <b>full</b> transparency, <b>market principles</b>, a level playing-field, <b>equal treatment and equal access</b>, with mutual benefits based on <b>consultations on an equal footing</b>.</p> <p><b>Sustainability is of paramount importance to all ASEM Partners who are all committed to the implementation of the SDGs.</b> Therefore, sustainability (<b>environmental, fiscal, social</b>) should be a quality benchmark for all Connectivity initiatives in the ASEM context.”</p> | <p>“Connectivity is about bringing countries, people and societies closer together. It facilitates access and is a means to foster deeper economic and people-to-people ties. It encompasses the hard and soft aspects, including the physical and institutional social-cultural linkages that are the fundamental supportive means to enhance the economic, political-security, and socio-cultural ties between Asia and Europe which also <i>contribute to the narrowing of the varying levels of development and capacities</i>.</p> <p><b><u>Bearing in mind the Asia-Europe Cooperation Framework 2000, ASEM connectivity aims to establish the sense of building ASEM partnership of shared interests. It upholds the spirit of peace, development, cooperation and mutual benefit.</u></b> It will also adhere to and effectively implement relevant <b><u>international norms and standards as mutually agreed by ASEM partners.</u></b></p> <p>ASEM Connectivity covers all modes of transport (aviation, maritime, rail and road) and also includes, among others, <b><u>institutions, infrastructure, financial cooperation, IT</u></b>, digital links, <b><u>energy</u></b>, education and research, <b><u>human resources development, tourism, cultural exchanges</u></b> as well as customs, trade and <b><u>investment</u></b> facilitation.</p> <p>ASEM connectivity covers all the three pillars of ASEM – economic, political and sociocultural. It should be <b><u>result-oriented</u></b>, and in support of the following key principles: level playing field, <b><u>free and open trade</u></b>, market principles, <b><u>multi-dimensionality, inclusiveness, fairness, openness</u></b>, transparency, <b><u>financial viability, cost-effectiveness</u></b> and mutual benefits. It should also contribute to the materialisation of the principles, goals and targets of The 2030 Agenda for Sustainable Development. Sustainability is one of the important quality benchmarks for the connectivity initiatives in the ASEM context.”</p> |

Source: European Union Joint Research Centre (2017) and Asia-Europe Meeting (2017). Unique features bold and underlined by authors.

Within its CEAS, the EU emphasizes its experience as a common market, using regional regulatory institutions, as its primary competitive advantage.<sup>9</sup> Given the degree of intra-

<sup>9</sup> European Commission “Connecting Europe and Asia – Building blocks for an EU Strategy,” 19 September 2018, available at: [https://eeas.europa.eu/headquarters/headquarters-homepage\\_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy](https://eeas.europa.eu/headquarters/headquarters-homepage_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy), (accessed 15 May 2020).

regional connectivity the EU has achieved within its own borders, this is a credible claim. Skepticism may remain, however, regarding the degree to which the EU is capable of transferring this expertise to different contexts. This is exemplified in statements by the EU's newly minted Ambassador-at-large for Connectivity, Romana Vlahutin, who has verbalized the EU's comparative advantage in constructing regional links. "[The] EU has connectivity in its genes, and has been doing massive work for decades inside its borders, but we now need to explain about the value we add to sustainable connectivity across the globe."<sup>10</sup> This is also connected with a relative decrease in importance of Western development assistance in recent decades, particularly in the area of infrastructure connectivity. In comparison to Japan and China, the EU will have to contend with criticism that it is a latecomer to the great Asian connectivity game, with a relative lack of experience and resources behind its initiative, at least for the moment.

In terms of the type of support provided, the EU differs considerably from China and Japan. Its support to infrastructure connectivity is primarily technical in nature, aiming for regulatory reform rather than the establishment of physical linkages. In the case of Southeast Asia, previous European support projects focused on the establishment of trade facilitation institutions or statistical capacity building to regional macroeconomic and trade monitoring. This exemplifies the European approach: beneficiaries are rather sub-regional or national-level institutional actors. There are indications in the new CEAS, however, that the EU aims to adjust the type of support it provides in infrastructure connectivity. The document explicitly ties the new EU strategy to the next edition of the multiannual financial framework (2021-2027), which sets the agenda for future EU external action funding. While the plan does not yet mention specific funding amounts, it proposes a resource mobilization mechanism built on the European Fund for Sustainable Development, which is part of the European External Investment Plan. The mechanism, which has been used to finance development projects in Africa and the EU neighborhood, includes a US\$70 billion fund to guarantee private sector and other investment (Müller 2020). How exactly this plan will be operationalized remains to be seen. EU decision makers have highlighted that funding will be mobilized primarily through the use of public-private partnerships, which have gained popularity in European development assistance in recent years. This is somewhat reflective of the Japanese approach, although there will likely be a lower degree of coordination between government and private sector, and a stronger reliance on public tenders and competitive bidding.

It should also be noted that the EU does not possess a development implementation agency similar to Japan's International Cooperation Agency (JICA), which will also force differences in approach. The EU's inclusion of detailed physical infrastructure priorities in its CEAS, referring to rail, road, sea, and air infrastructure, is also indicative of the larger financial role it seeks to play – physical infrastructure links are known for their larger financial impact compared to technical cooperation aiming for regulatory change. As such, the EU will require a more muscular financing mechanism in order to enable a bigger role in physical infrastructure. This change in approach by the EU is indicative of policy learning from East

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<sup>10</sup> Belfer Center (2020) "How the EU Connects: New Connectivity Strategy with Ambassador Vlahutin," available at: <https://www.belfercenter.org/event/how-eu-connects-new-connectivity-strategy-ambassador-vlahutin>, (accessed 4 May 2020).

Asian actors, particularly China and Japan. Given the EU’s voiced reluctance to change its approach from institutional cooperation to other modes of support in 2018, its strategic adaptations in recent years are surprising. Competition with, but also learning from the influence that China and Japan have gained through their support for physical infrastructure linkages must be taken into account as an explanation of the EU’s strategic pivot to Asian connectivity support.

The CEAS makes extensive reference to multilateral forums. The strategy references multiple multilateral processes and institutions, including the WTO, the IMF, the World Bank, but also the Sustainable Development Goals and the Paris Agreement.<sup>11</sup> In part, these are certainly references aimed at distinguishing the EU’s connectivity support from that of China. Interestingly, however, the EU appears somewhat more open towards China’s alternative multilateralism than Japan. The CEAS contains a prominent reference to the AIIB, in which several European states are shareholders (Wilson 2019b). The EU’s strong references to multilateralism may be indicative of its hope that this will facilitate its entry as a player in infrastructure connectivity, occupying an organizational niche (Brosig 2011) in contrast to the existing approaches by China and Japan. It is clear that other actors have been considered in designing the EU’s strategy. At a public talk, Romana Vlahutin suggested that “there is no connectivity solution that can work one power alone, no matter how big this power is,” and that the EU may provide “state-of-the-art standards and norms, quality of infrastructure investment and sustainability in economic, financial, environmental and social terms.”<sup>12</sup> EU rhetoric clearly points towards a consideration of multi-actor interplay in its connectivity strategy.

For the moment however, concrete cooperation between the EU and other actors remains a rather vague prospect. Compared to the established Chinese-Japanese cooperation in infrastructure connectivity, the EU does not yet have a sufficient track record for other actors to assess its value and reliability. It remains to be seen to what degree the EU is able to collaborate with other actors in the Asian connectivity arena.

**Table 4: The EU’s approach to infrastructure connectivity**

| Definition  | Comparative Advantage   | Character of Resources   | Multilateralization  |
|---|---|--|--|
| Sustainable infrastructure; emphasis on physical links; basis for economic prosperity | Common market experience, multi-modal transport networks, environmental and social sustainability | Technical cooperation; private sector-driven; strong emphasis on regional-level projects | Link connectivity to SDGS, WTO, and Paris Agreement; commitment to ADB but also AIIB |

Source: Authors.

<sup>11</sup> European Commission “Connecting Europe and Asia – Building blocks for an EU Strategy,” 19 September 2018, available at: [https://eeas.europa.eu/headquarters/headquarters-homepage\\_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy](https://eeas.europa.eu/headquarters/headquarters-homepage_en/50708/Connecting%20Europe%20and%20Asia:%20Building%20blocks%20for%20an%20EU%20Strategy), (accessed 15 May 2020).

<sup>12</sup> Belfer Center (2020) “How the EU Connects: New Connectivity Strategy with Ambassador Vlahutin,” available at: <https://www.belfercenter.org/event/how-eu-connects-new-connectivity-strategy-ambassador-vlahutin>, (accessed 4 May 2020).

## Conclusion

Contrary to common perspectives of pure competition between great powers in infrastructure connectivity, this paper has highlighted that geopolitical learning is another important contributor to the emerging strategies of China, Japan, and the EU in Asian infrastructure connectivity support. The four dimensions analyzed within this paper – definition, comparative advantage, type of support, and multilateralization – have enabled us to highlight differences but also similarities in the three actors’ approaches. Table 5 provides an overview of the features characteristic of the three actors’ strategies.

It is clear that a process of competitive rule setting is at play in Asian connectivity. As it is, interactions between the providers of connectivity support have a large effect on how strategies are designed, executed, and modified. In the case of Asia, connectivity rule setting was first brought about by China, which acted as a first mover. Japan’s adaption of its infrastructure connectivity strategy in the wake of China’s BRI can therefore be characterized as an instance of policy learning. Notably, China’s current approach to infrastructure connectivity provision is in fact inspired by Japan’s past strategy (Jiang 2019), which means that a sort of temporally staggered mutual learning process has taken place.

**Table 5: Summary of China, Japan and EU’s infrastructure connectivity approach**

|              | <b>Definition</b>   | <b>Comparative Advantage</b>  | <b>Character of Resources</b>  | <b>Multilateralization</b>   |
|--------------|---|---|--|--|
| <b>China</b> | Lacking clarity; flexible; “win-win”; basis for economic prosperity                   | Chinese development experience, rapid build-up of physical links; state-led institutions; flexibility and pragmatism; endowment with financial, material, and labor resources   | Financial; material, labor; pragmatic, apolitical approach; state-led  | Bilateral, but moving towards multilateralism; establishment of new institutions                                 |
| <b>Japan</b> | International public good; basis for economic prosperity                              | Technological leadership; economic efficiency; low lifecycle costs; operational safety, resilience against natural disasters; consideration of environmental and social impacts, high contribution to local society and economy | Financial; technological; private sector-driven; first more restrictive, now increasingly pragmatic and apolitical | Use of multilateral institutions, particularly ADB; endorsement of connectivity standards by multilateral forums |
| <b>EU</b>    | Sustainable infrastructure; emphasis on physical links; basis for economic prosperity | Common market experience, multi-modal transport networks, environmental and social sustainability   | Technical cooperation; private sector-driven; strong emphasis on regional-level projects                           | Link connectivity to SDGS, WTO, and Paris Agreement; commitment to ADB but also AIIB                             |

Source: Authors.

The fact that the EU, as a representative of “the West,” displays similar tendencies towards policy learning makes it an even more illustrative example than Japan. Its entrance into Asian connectivity support reflects a case of policy learning from the leverage gained by China and Japan through such programs. Following years of focusing on institutional connectivity, the EU’s re-prioritization of physical infrastructure links in its most recent strategy reflects Asian notions of connectivity. This somewhat belies that more pragmatic forms of Chinese and Japanese support may have been judged as more successful or at least as more influential than publicly appreciated by European decision makers. Its negotiation of a common connectivity definition within ASEM also highlights two things: although the EU is contesting an emerging Asian connectivity consensus, it is also willing to adapt to certain principles such as Chinese and Japanese rhetoric of shared interest and mutual benefits. Mutual contestation of connectivity between China, Japan, and the EU is likely to remain a feature of the Asian development discourse in the years to come. Nonetheless, these areas of convergence highlight that the actors may sometimes not be as far apart as publicly emphasized.

China has had a measurable impact on the strategies of other actors. While the heavy criticism of China has prompted changes in the Chinese stance, it has also resulted in change in the strategies of other actors, including Japan and the EU, which have emphasized different aspects of their strategy not only based on their comparative advantages, but also in direct reference to previous Chinese strategy. Given that all of these strategies address developing Asian countries as their beneficiaries, a question that should be posed in the future is to what degree these countries have had and can still have an influence on these strategies. While China, Japan, and the EU clearly refer to one another, their consideration of different types of recipient is less clear.

We would like to highlight two limitations of our approach and propose avenues for further research. In our analysis, we have conceptualized China, Japan, and the EU as unified, singular actors. This is of course not the case as, in reality, the states’ and organizations’ views are dynamic and diversified. In China, there are different perspectives on connectivity within the central and the provincial governments. In the case of the EU, the Commission holds different views of EU-China relations than other European institutions and some of its member states, particularly in Eastern Europe.

In addition, this analysis is primarily based on secondary policy documents and scholarly debates on competitive infrastructure connectivity support. To offer a more nuanced and holistic view on this topic, we suggest future research to more closely examine countries’ practices and specific projects on the ground. Rüländ’s (2019) vignettes of unsustainability in connectivity development are good examples of the type of research that could still be carried out. It is our belief that such studies would in fact highlight further similarities between Chinese, Japanese, and European approaches to connectivity development. Although Japanese and European development rhetoric publicly differ greatly from that of China, the same may not be the case for their application on the ground. Finally, we believe that it would be important to include the perspectives of local communities affected by connectivity projects. This would go some way towards providing new insights into the needs and challenges of connectivity development on the ground.

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## **List of Abbreviations**

ADB – Asian Development Bank

AIIB – Asian Infrastructure Investment Bank

ASEAN – Association of Southeast Asian Nations

ASEM – Asia-Europe Meeting

BRI – Belt and Road Initiative

CEAS – Connecting Europe and Asia Strategy

DAC – Development Assistance Committee

EU – European Union

FOIP – Free and Open Indo-Pacific

G7 – Group of Seven

IMF – International Monetary Fund

JICA – Japan International Cooperation Agency

OECD – Organisation for Economic Co-Operation and Development

PQI – Partnership for Quality Infrastructure

US – United States



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