



REPORT

JAPAN AND STRATEGIC CONNECTIVITY

POLICIES, PARTNERS, AND POSSIBILITIES

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LIST OF ABBREVIATIONS

AAGC	Asia-Africa Growth Corridor
ACSA	Acquisition and Cross-Servicing Agreement
ADB	Asian Development Bank
AEF	Act East Forum
AFC	Africa Finance Corporation
AfDB	African Development Bank
ASEAN	Association of Southeast Asian Nations
B2B	business-to-business
B3W	Build Back Better World
BBB	Build Back Better
BCIM	Bangladesh–China–India–Myanmar Economic Corridor
BIG-B	Bay of Bengal Industrial Growth Belt
BRI	Belt and Road Initiative
BUILD	Better Utilization of Investments Leading to Development Act
DCC	Development Cooperation Charter
DFC	Development Finance Corporation
DG	Directorate-General
DG Connect	Directorate-General for Communications Networks, Content and Technology
DG INTPA	Directorate-General for International Partnerships
DG MOVE	Directorate-General for Mobility and Transport
DOGE	Department of Government Efficiency
DPI	Digital Public Infrastructure
DRC	Democratic Republic of Congo
EPA	Economic Partnership Agreement
EPQI	Expanded Partnership for Quality Infrastructure
FOIP	Free and Open Indo-Pacific
FTA	Free Trade Agreement
G2G	government-to-government
GCI	Global Civilization Initiative
GDI	Global Development Initiative
GDP	Gross Domestic Product
GG	Global Gateway
GGI	Global Governance Initiative
GSI	Global Security Initiative
ICT	information and communication technology
IMEC	India-Middle East-Europe Economic Corridor
INSTC	International North–South Transport Corridor
IOR	India Ocean Region
IPEF	Indo-Pacific Economic Framework
IPOI	Indo-Pacific Oceans’ Initiative
ISA	Information Sharing Agreement
JBIC	Japan Bank for International Cooperation
JICA	Japan International Cooperation Agency
LNG	liquefied natural gas
MAGA	Make America Great Again
MoU	Memorandum of Understanding
NER	Northeastern Region of India
ODA	Official Development Assistance
OPIC	Overseas Private Investment Corporation
OSA	Official Security Assistance
PGII	Partnership for Global Infrastructure and Development
PhilRailCon	Philippine Railway Conference

PJEP	Philippines-Japan Economic Partnership Agreement
PQI	Partnership for Quality Infrastructure
PRI	Philippine Railway Institute
Quad	Quadrilateral Security Dialogue
RAA	Reciprocal Access Agreement
RHIB	Rigid-Hulled Inflatable Boats
SPA	Strategic Partnership Agreement
TC	Triangular Cooperation
TCTC	Trans-Caspian Transport Corridor
TITR	Trans-Caspian International Trade Route
TRIPP	Trump Route for International Peace and Prosperity
TTC	Transatlantic Trade and Technology Council
UAE	United Arab Emirates
USAID	United States Agency for International Development
VFA	Visiting Forces Agreement
WHO	World Health Organization

EXECUTIVE SUMMARY

This report analyses the increasingly important role of infrastructure development and connectivity as a central arena of global geopolitical competition, particularly focusing on Japan's connectivity policy under the banner of the Free and Open Indo-Pacific (FOIP). Infrastructure, institutions, and norms are becoming weaponised in a dynamic geopolitical competition, linking development, security, and great-power rivalry. China's Belt-and-Road Initiative (BRI), announced in 2013, served as the initial catalyst, prompting other major players – including Japan, the US, the EU, and India – to roll out their own competing strategies. The core aim of this report is to explore how Japan seeks to utilise strategic connectivity, specifically through its multi-layered approach, as a pivotal geopolitical instrument to project influence and promote a rules-based order, amidst rising competition with China.

Japan's policy aligns Official Development Assistance (ODA), economic cooperation, security considerations, and national interests. Southeast Asia, particularly the Philippines, is a prime focal region, showcasing the integration of physical, institutional, and people-to-people connectivity with increased defence connectivity through tools such as Official Security Assistance (OSA). Furthermore, Japan has sought to collaborate with external actors in third regions. However, while Japan's cooperation with India and the EU signals diplomatic alignment, the practical impact has been limited due to implementation difficulties, bureaucratic fragmentation, and weak private-sector incentives.

As an illustrative case study of a potential collaborative effort, the India–Middle East–Europe Economic Corridor (IMEC) can offer an alternative to China's connectivity dominance. Japan is uniquely positioned to stabilise the IMEC and provide essential governance, regulatory harmonisation, and soft infrastructure. However, the current volatile politics of 'disconnectivity' by the US, Japan's key ally, poses a major obstacle. The US policy, marked by tariffs, the withdrawal from international organisations, and a shift towards transactional 'America First' deals, creates a strategic void and raises questions about whether allies can compensate for this retreat.

Overall, a shift in focus in the connectivity debate can be witnessed in policy circles. There is a growing emphasis on collaborative efforts toward more narrowly defined areas, specifically economic security, competitiveness, and military security and defence cooperation.

This report offers the following ten actionable policy recommendations, in particular, for the European Union.

For the EU's Global Connectivity Agenda:

- Cooperate pragmatically with the US;
- Cooperate with other major actors;
- Reassess the EU approach.

For cooperation with like-minded actors:

- Utilise comparative advantage;
- Leverage divisions of labour;
- Learn from Japan's multi-layered approach;
- Mobilise the private sector.

For further research:

- Bridge policymaking and academic study;
- Emphasise the recipient perspective;
- Research narrowly defined forms of connectivity.

beyond its technical and administrative connotations to function as an intentional strategic instrument, increasingly deployed by states as a mechanism for extending geopolitical influence and consolidating power in other countries and regions.³ China's Belt-and-Road Initiative (BRI) illustrates how large-scale projects can extend spheres of influence and serve as a form of economic statecraft. Recent connectivity initiatives by numerous international actors have, to a large extent, constituted both implicit and explicit responses to the BRI. Furthermore, geopolitical considerations are triggering collaborative efforts in the form of connectivity partnerships.

'Connectivity wars' have become part and parcel of the ongoing geopolitical competition

INTRODUCTION

Over the past decade, the concept of connectivity has gained considerable prominence within the discourse of foreign policy. The term encompasses both *hard* infrastructure – such as transportation networks, digital cables, satellites, and other physical forms of exchange – and *soft* dimensions, including regulatory frameworks, standards harmonisation, socio-cultural interactions, digital linkages, and customs facilitation.¹ Developing global connectivity is essential, as the world confronts an unprecedented demand for infrastructure investment. By 2035, the global economy is projected to necessitate annual infrastructure investments amounting to approximately \$4.2 tn, equivalent to 3.5% of global GDP. This requirement reflects the influence of major structural megatrends, including accelerated urbanisation, persistent supply-chain vulnerabilities, climate transition, and the transformative impact of AI-driven digitalisation.²

Yet infrastructure is not only an economic necessity; it is also a strategic instrument of foreign policy. Connectivity has clearly evolved

Actors such as the European Union and Japan have sought to leverage their comparative advantages – particularly in the domains of quality, sustainability, standards, and inclusivity – as a means of positioning themselves competitively vis-à-vis China, especially in strategically important regions such as Africa. For some, 'connectivity wars' have become part and parcel of the ongoing geopolitical competition.⁴ At the same time, under the second Trump administration, the US has undergone a significant strategic shift to 'transactional connectivity', prioritising short-term national gains over long-term global stability.

The elevation of strategic connectivity into a primary instrument of foreign policy raises critical questions. How do states seek to leverage connectivity-related investments and networks to project power and navigate global rivalries? How do they integrate diplomacy, development, and defence and security? What are the main challenges of connectivity partnerships between like-minded actors in the current geopolitical climate? How can key actors navigate the strategic void left by the US's transactional and 'disconnective' America First policy?

¹ ASEM Pathfinder Group on Connectivity, "[Chair Summary](#)," European External Action Service, 21 June 2017.

² Allianz Research, "[3.5% to 2035: Bridging the global infrastructure gap](#)," Allianz, 30 July 2025.

³ See the definition by Marcin Kacperek, "[\(Re\)defining connectivity](#)," *Warsaw Institute*, 21 October 2020.

⁴ Mark Leonard (ed), [Connectivity Wars. Why Migration, Finance and Trade are the Geo-Economic Battlegrounds of the Future](#) (European Council on Foreign Relations, 2016).

Against this background, this report zooms in on the role of Japan as a globally important actor in the sphere of connectivity. The prime aim of the report is to explore how Japan seeks to utilise strategic connectivity, specifically through its multi-layered approach, as a pivotal geopolitical instrument to project influence and promote a rules-based order, amidst rising competition with China.

After exploring conceptual dimensions of (strategic) connectivity, the report analyses Japan's policy both in a regional framework, with a focus on Southeast Asia, and in an interregional context, i.e., cooperation with India and the EU. In addition, the report explores the potential of an extended outreach in the Middle East. Furthermore, it examines the US's connectivity policy under the second Donald Trump presidency and its ramifications.

The first chapter by Bart Gaens and Prannavan Surendran surveys the rise of strategic connectivity as a central instrument in global politics, tracing its evolution from a descriptive condition of linkages to a deliberate geopolitical tool. Connectivity has become a means for states to project influence, contest rivals, and shape global order. The chapter situates connectivity within broader debates on modernity, multipolarity, and global governance, showing the interplay between initiatives such as the BRI, Japan's Partnership for Quality Infrastructure, the EU's Global Gateway, and India's corridor projects.

Connectivity has become a means for states to project influence, contest rivals, and shape global order

The second chapter by Wrenn Yennie Lindgren explores Japan's evolving strategic connectivity agenda in the Indo-Pacific, with a focus on Southeast Asia and the Philippines. It highlights how Japan's Official Development Assistance (ODA) has been complemented by new frameworks such as Official Security Assistance (OSA), which provides non-lethal defence equipment and fosters defence connectivity through institutional linkages and capacity building. The chapter zooms in on so-called multi-layered connectivity – combining hard infrastructure with digital, human, and

knowledge linkages – as both a developmental tool and a counterweight to the BRI. The Philippines serves as a key case study, where Japan is the largest infrastructure investor in areas ranging from transport to customs capacity building and maritime security.

The third chapter by Bart Gaens analyses how Japan seeks to cooperate, through the creation of connectivity partnerships, with India and the EU, assessing whether they function as genuine strategic collaboration or remain largely rhetorical. It shows how Japan promotes “quality infrastructure” under its Free and Open Indo-Pacific (FOIP) vision, aligning with partners to emphasise sustainability, inclusiveness, and the rule of law. The chapter explores Japan and India's envisaged cooperation in Africa and examines the Partnership on Sustainable Connectivity and Quality Infrastructure between Japan and the EU.

The fourth chapter by Jagannath Panda reviews the India–Middle East–Europe Economic Corridor (IMEC) and posits that Japan's integration is essential for its long-term viability. Conceived in 2023, IMEC aims to reconfigure trade and energy flows between India, the Gulf, and Europe as an alternative to the BRI, but faces major obstacles due to instability in the Middle East, particularly the Gaza war and insecurity in the Red Sea. While the US provided initial political impetus, its commitment has waned, leaving implementation gaps. The chapter analyses why Japan's commitment to the initiative could provide the needed impetus to transform IMEC into a viable connectivity network in the Middle East.

The fifth chapter by Ville Sinkkonen explores how the US, a close ally of both Japan and the EU, has reshaped its connectivity policy during Donald Trump's second presidency, shifting from strategic to transactional connectivity. It highlights the tension between the America First agenda – marked by dismantling institutions such as the United States Agency for International Development (USAID), tariff gambits, and restrictive immigration – and the enduring paradigm of great-power competition with China.

1. STRATEGIC CONNECTIVITY IN GLOBAL POLITICS

Bart Gaens and Prannavan Surendran

1.1. THE STUDY OF STRATEGIC CONNECTIVITY

As of the 2010s, connectivity has come to the fore as a central analytical concept in international relations, political economy, and global governance. While many scholars and policy analysts have employed the term pragmatically, often without offering a definition, an increasingly diverse body of research conceptualises connectivity comprehensively, emphasising its multifaceted and diverse nature. For instance, Plagemann et al. support the broad notion of connectivity, as it includes not only infrastructure and trade routes, but also non-physical elements that range from regional integration schemes, trade arrangements, and customs cooperation to people-to-people linkages, educational exchanges, and digital standards.⁵

This broad conceptualisation of the term allows for the incorporation of a variety of themes and aspirations. At the same time, the inherent vagueness and flexibility of the term have resulted in criticism centring on its use as an ‘empty signifier’ without a rigorous definition.⁶ Furthermore, the literature often fails to bridge academic and policy approaches and articulate how connectivity is intertwined with the dynamics of hegemony and geopolitics.⁷ The challenge, therefore, lies in analysing connectivity not merely as infrastructure or interdependence but as a tool used to shape power relations.

To address this gap, Gaens et al. introduced a systematic framework that distinguishes six connectivity spheres: infrastructure, institutional arrangements, economic and financial exchange, knowledge diffusion, societal interaction, and security.⁸ Additionally, they outline six logics of connectivity: cooperation, copying, cushioning, contestation, containment, and coercion through which actors intentionally create, modify, or limit connections. They highlight that connectivity is

Connectivity is not an automatic outcome but requires some degree of intentionality and active agency

not an automatic outcome but requires some degree of intentionality and active agency, and that disconnectivity likewise requires disconnective agency. For many authors, this intentionality places connectivity firmly within geopolitical and geoeconomic contestation.⁹ While not all interactions, transactions, or forms of cooperation qualify as connectivity, the intentional employment of systems such as infrastructure, trade, governance, migration, or security, for example, creates the networks and dependencies defined as strategic connectivity.

Recent literature situates connectivity within the wider debate about modernity, global order, and the transformation of world politics. Schneider demonstrates that infrastructure

Connectivity becomes a mechanism through which political and normative orders are projected, negotiated, or contested

not only shapes trade but also influences the underlying norms and standards of modernity: connectivity projects embed visions of development, governance, and progress.¹⁰ Çelik adds that connectivity is never

⁵ Johannes Plagemann, Sreeradha Datta, and Sinan Chu. “The paradox of competing connectivity strategies in Asia,” *Third World Quarterly* 42, no. 10 (2021): 2265–2281.

⁶ Mohammadbadgher Forough and Anna Fünfgeld. “The empty signifier of ‘connectivity’: how infrastructure reorders the world,” *Review of International Political Economy* 32, no. 5 (2025): 1593–1617.

⁷ Mohammadbadgher and Fünfgeld, 2025.

⁸ Bart Gaens, Ville Sinkkonen, and Henri Vogt. “Connectivity and order: An analytical framework,” *East Asia* 40, 21 February 2023.

⁹ Nadine Godehardt and Karoline Postel-Vinay. “Connectivity and geopolitics: beware the ‘new wine in old bottles’ approach,” *SWP Comment* 2020/C 35, 1 July 2020.

¹⁰ Florian Schneider, “Actors and Agency in China’s Belt and Road Initiative: An Introduction,” in Florian Schneider (ed), *Global Perspectives on China’s Belt and Road Initiative* (Amsterdam University Press, 2021).

ideologically neutral: identity politics, values, and strategic narratives are essential to how actors design and legitimise connectivity initiatives.¹¹ Connectivity becomes a mechanism through which political and normative orders are projected, negotiated, or contested.

The discussion on the geopolitical dimension of connectivity has evolved into a major research field. Competition over connectivity constitutes a new form of geopolitics, marked by unprecedented intensity and scale in the 21st century.¹² Soler i Lecha further notes that infrastructure, which is designed to promote integration, can contribute to fragmentation when subjected to major power geoeconomic strategies.¹³ Karadeniz warns of emerging connectivity wars involving infrastructure rivalry, the weaponisation of international institutions, and geoeconomic coercion.¹⁴

Meanwhile, Okano-Heijmans interprets the EU's Indo-Pacific connectivity initiative as an indirect response to China's expanding initiatives, which signals a shift toward a more geopolitical EU foreign policy.¹⁵ Awate et al. identify technology, migration, political liberalisation, and institutional transformation as key enablers of global connectivity, revealing that connectivity is not solely about building infrastructure but about shaping global political and social transformations.¹⁶ Curtis offers a complementary

perspective, arguing that the success or failure of states in the 21st century will increasingly depend on their ability to shape transnational infrastructures.¹⁷ The erosion of confidence in the US-led inter-national liberal world order, the rise of China and infrastructure at the core

The erosion of confidence in the US-led world order, the rise of China, and the pressures of climate change explain why infrastructure has become central to geopolitical competition

of its foreign policy, and the pressures of accelerating climate change are trends that explain why infrastructure has become a central arena for geopolitical competition. Within this geopolitical context, China's BRI has been in operation for a long time without major opposition; however, growing Chinese influence around the world has prompted competing powers to develop counter-initiatives. This emerging rivalry could heighten tensions and ultimately split the landscape into competing infrastructure blocs, each built on its own standards and shaped by different political and economic visions.

The emerging rivalry could heighten tensions and ultimately split the landscape into competing infrastructure blocs

¹¹ Hatice Çelik, "Asian and European Connectivity Initiatives: Intersecting Geopolitical Strategies," *Perceptions: Journal of International Affairs* 29, no. 2 (2024): 28–49.

¹² Godehardt & Postel-Vinay, 2020.

¹³ Eduard Soler i Lecha, "The Global Gateway: Connectivity and Competition in the Global Race for Infrastructures," in Oriol Costa, Eduard Soler i Lecha and Martijn C. Vlaskamp (ed), *EU Foreign Policy in a Fragmenting International Order* (Palgrave Macmillan, 2025).

¹⁴ Radiye Funda Karadeniz, "From Border Walls to Corridors: An Analysis on Connectivity in Changing Multilateral World Order," *Perceptions: Journal of International Affairs* 29, no. 2 (2024): 8–27.

¹⁵ Maaïke Okano-Heijmans, "The EU's Connectivity Strategy 2.0: Global Gateway in the Indo-Pacific," in Yuichi Hosoya and Hans Kundnani (ed), *The Transformation of the Liberal International Order* (Springer 2024).

¹⁶ Snehal Awate, Ram Mudambi, Vittoria G. Scalera, and Andreas P. J. Schotter. "Global connectivity in a world of disruptions," *Journal of International Management* 31, no. 5 (2025).

1.2. RECENT HISTORY

In sum, connectivity, understood as "the state or degree of connectedness," has long existed as a descriptive condition, but its deployment as a deliberate, strategic, and geopolitical instrument is a comparatively recent phenomenon. Drawing on Godehardt and Postel-Vinay, the 'geopoliticisation' of connectivity can be traced through three partially overlapping stages.¹⁸ The first of these is connectivity as regional integration. A salient example is the Association of Southeast Asian Nations (ASEAN), which has consistently emphasised infrastructural and institutional linkages as mechanisms for fostering

¹⁷ Simon Curtis, "The Emerging Geopolitics of Infrastructure Competition," *The Chicago Council on Global Affairs*, 16 October 2023.

¹⁸ Godehardt & Postel-Vinay, 2020.

integration. The adoption of the Master Plan on ASEAN Connectivity in 2010 was pivotal in introducing the concept of connectivity into the lexicon of international relations. Rather than pursuing political integration in the conventional sense, ASEAN has prioritised physical linkages (e.g., transport, information and communications technology, and energy networks), institutional mechanisms (e.g., trade, investment, and services liberalisation), and people-to-people exchanges (e.g., education, culture, and tourism) as the principal means of advancing an integrated ASEAN community. The plan was subsequently revised in 2015 and reissued as the Master Plan on ASEAN Connectivity 2025, which identified five strategic domains – sustainable infrastructure, digital innovation, seamless logistics, regulatory harmonisation, and people mobility – as the key pillars for deepening regional integration.

The BRI has imbued connectivity with a spatial and geopolitical dimension, transforming it into a vehicle for projecting influence and reordering the international system

The second phase of the geopoliticisation of connectivity has been propelled by China's BRI, which inaugurated a novel political arena aimed at reshaping global infrastructure and advancing a Sinocentric order. This phase has generated a complex nexus of spatial configurations – including economic corridors, transportation hubs, and logistical networks – alongside layered technological systems designed to reconfigure global flows in accordance with China's strategic vision. In doing so, the BRI has imbued connectivity with an explicitly spatial and geopolitical dimension, transforming it from a functional mechanism of exchange into a vehicle for projecting influence and reordering the international system.¹⁹

The third stage of the geopoliticisation of connectivity has been characterised by the responses of liberal powers, notably Japan and the EU, each advancing distinct strategies to counterbalance China's initiatives. Japan introduced the Partnership for Quality

Infrastructure (PQI) in 2015, initially budgeted at \$110 bn and expanded to \$200 bn in 2016. Central to Tokyo's approach was the emphasis on quality, defined in terms of economic efficiency, safety, resilience, and both environmental and social sustainability, with the explicit aim of contributing to local societies and economies.

In 2018, the European Commission issued the policy paper, "Connecting Europe and Asia – Building Blocks for an EU Strategy," which was clearly conceived as a European response to the BRI.²⁰ The document underscored that connectivity should be economically, fiscally, environmentally, and socially sustainable; comprehensive across sectors and financing frameworks; and firmly grounded in international rules and an open, transparent investment environment. This articulation provided not only a European model of connectivity but also a blueprint for mobilising international support around the values and principles promoted by the EU. Importantly, the Asia-focused strategy laid the foundation for the Union's global connectivity framework, the Global Gateway (GG), launched in 2021.

India, meanwhile, has pursued a connectivity agenda centred on transport and economic corridors. Domestically, projects such as the Delhi–Mumbai Industrial Corridor remain central, while internationally, New Delhi has invested in ventures such as the Bangladesh–China–India–Myanmar Economic Corridor (BCIM), the International North–South Transport Corridor (INSTC), and the more

Geostrategic sensitivities, rather than purely economic incentives, drive India's approach

recent India–Middle East–Europe Economic Corridor (IMEC). Geostrategic sensitivities, rather than purely economic incentives, drive India's approach.²¹

²⁰ High Representative of the Union for Foreign Affairs and Security Policy, "[Connecting Europe and Asia – Building blocks for an EU Strategy](#)," European Commission, 19 September 2018.

²¹ Angelos Delivorias and Falkenberg, Dorothee. "[India's connectivity initiatives – a multifaceted approach](#)," European Parliamentary Research Service, Briefing PE 762.471, October 2024.

¹⁹ Godehardt and Postel-Vinay, 2020, 5.

Building upon the preceding three stages – connectivity as regional integration, as geopolitical spatialisation, and as competitive emulation – a fourth phase may be identified: connectivity as a driver of a multiplex world. For many observers, the international system is inevitably transitioning toward multipolarity, propelled by the rise of new great powers, most prominently China, but also India and (arguably) Russia. Since the onset of the second Trump administration, this notion has gained notable traction, appearing to constitute a central element of current US foreign policy.

As Kochis observes, for the current US administration, “[t]he world has morphed into multipolarity, and the unipolar moment is either irretrievable or not worth the investment to recapture”.²² The administration’s rapid rapprochement with Russia – undertaken at the expense of sustained support for Ukraine – illustrates this recalibrated view of global order. Multipolarity is actively endorsed by states such as India, which perceive it as a means of expanding strategic autonomy, while in Europe, the concept has been invoked as a call to arms for institutional reform. French President Emmanuel Macron, for instance, has argued that in an increasingly multipolar world, the European Union must urgently adapt or risk marginalisation.

While polarity and the balance of power remain central to analyses of international order, it is equally important to consider dimensions that extend beyond capability-based indicators. These include the normative frameworks and values that delineate the boundaries of permissible action, as well as the interactions and connections among diverse actors – the order’s underlying infrastructure.²³ Acharya conceptualises this evolving landscape as a multiplex world: a system without a global hegemon, characterised instead by a plurality of actors linked through complex interdependencies and fragmented governance frameworks.²⁴

Within such a multipolar and multiplex environment, connectivity has assumed a prominent function. Its role transcends the material capabilities that traditionally define polarities, encompassing instead the normative, institutional, and societal dimensions of global politics.

The role of connectivity transcends the material capabilities that traditionally define polarities, encompassing instead the normative, institutional, and societal dimensions of global politics

1.3. A GEOPOLITICAL TOOL

The BRI, inaugurated in 2014, is widely regarded as the earliest and most prominent manifestation of strategic connectivity. The first half of 2025 marked a record high in BRI-related ventures, amounting to approximately \$66.2 bn in construction contracts and \$57.1 bn in investments – surpassing the total \$122 bn of engagements recorded for the entire year of 2024.²⁵ Today, the BRI encompasses nearly 150 participating states and extends beyond its foundational components – the overland Silk Road Economic Belt and the 21st Century Maritime Silk Road – to include initiatives such as the Digital, Space, and Health Silk Roads. Progress has also been made in advancing the Polar Silk Road, exemplified by the launch of the first container vessel operating along the China–Europe Arctic Express Route via the Northern Sea Route in October 2025.

Complementing these infrastructural undertakings, Beijing has introduced a range of multilateral frameworks, including the Global Development Initiative (GDI), the Global Security Initiative (GSI), and the Global Civilization Initiative (GCI), all launched between 2021 and 2023. Officially framed as contributions to the vision of “a global community of shared future,” these initiatives function as instruments for articulating a counter-narrative to the western rules-based

²² Daniel Kochis, “[The Trump Administration’s belief in multipolarity informs its transatlantic security policy](#),” *European View* 24, no. 1 (2025): 25–33.

²³ Gaens et. al., 2023.

²⁴ Amitav Acharya, *The End of American World Order* (Polity, 2018).

²⁵ Christophe Nedopil, “[China Belt and Road Initiative \(BRI\) Investment Report 2025 H1](#),” *Griffith Asia Institute and Green Finance & Development Center*, FISF, 2025.

order and for advancing the principle of non-interference as a normative standard in global governance.²⁶ Most recently, in September 2025, China unveiled the Global Governance Initiative (GGI). In short, the BRI is no longer just about infrastructure and connectivity but has increasingly turned into a more security-oriented framework, characterised by an increasingly explicit anti-western orientation.²⁷ This evolution illustrates connectivity's strategic salience as a vehicle for reshaping global political dynamics.

The BRI is no longer just about infrastructure and connectivity but has turned into a more security-oriented framework, characterised by an increasingly explicit anti-western orientation

As mentioned above, a range of actors have rolled out competing strategic connectivity initiatives. Following its Partnership for Quality Infrastructure of 2015, Japan integrated connectivity as a core pillar within the FOIP strategy in 2016. In 2021, the European Union introduced its Global Gateway, building on earlier (Asia-focussed) connectivity strategies. A year later, the G7 launched its Partnership for Global Infrastructure and Development (PGII), while India unveiled the India–Middle East–Europe Economic Corridor (IMEC) at the G20 Summit in 2023.

Connectivity and disconnectivity represent two interrelated dimensions of contemporary international relations, often deployed through coercive instruments that may be military, economic, institutional, diplomatic, or symbolic in nature. In the United States, policies of deliberate disconnection have become a defining feature of the second administration of President Donald Trump. Illustrative measures include the imposition of global tariffs, \$8.3 bn in reductions to foreign aid, the dismantling of USAID, and the introduction of a travel ban for citizens from twelve countries that “don't have things under

control.”²⁸ Other examples are the suspension of foreign student admissions to Harvard University, the termination of the Green Deal, the renewed abandonment of the Paris Agreement – a legally binding international treaty on climate change – and the most recent withdrawal from 66 global organisations. Collectively, these actions exemplify disconnectivity across domains ranging from economic policy and environmental governance to educational and societal exchange and human rights.

By contrast, China has sought to capitalise on these developments by positioning itself as a proponent of connectivity. Initiatives such as the introduction of an ASEAN Visa for ten Southeast Asian states, diplomatic outreach campaigns in Europe and Southeast Asia, and the promotion

of its role as a global champion of free trade highlight Beijing's strategic use of connectivity as a counterweight to US disengagement.

Strategic connectivity has clearly become a key notion underlying current policy strategies of the world's major actors. As Khanna contends, the locus of geopolitical competition is shifting from contests over territorial control to competition over connectivity, wherein instruments such as special economic zones and infrastructure alliances function as pivotal tools in a global tug-of-war.²⁹ Conceptualising connectivity as a form of functional geography – manifested through transportation corridors, energy grids, and financial networks – reveals the pathways through which power is projected and leverage exercised. In this sense, connectivity is not merely technical or logistical, but profoundly geopolitical in character.³⁰

1.4. JAPAN'S CONNECTIVITY POLICY

Analysing Japan's connectivity endeavours as a geopolitical tool, a central theme of this report, requires a few words of explanation on

²⁶ Jyrki Kallio, “China's Global Initiatives,” *Finnish Institute of International Affairs*, Briefing Paper 401, December 2024.

²⁷ Alicia García-Herrero, “The Belt and Road Initiative transformation makes it a more – not less- useful tool for China,” *Bruegel, ZhongHua Mundus Newsletter*, 15 March 2023.

²⁸ BBC, “Trump says travel ban applies to countries that 'don't have things under control',” *BBC*, 5 June 2025.

²⁹ Parag Khanna, “Connectography: Mapping the Future of Global Civilization,” *Random House*. 2016. xvi-xvii.

³⁰ Parag Khanna, “Bridges to everywhere? Connectivity as paradigm,” *Horizons* 12 (2018): 42–65.

the specific features of Japan's policy. Japan's connectivity policy is closely intertwined with its distinctive model of ODA, which has long been strategically aligned with the country's broader objectives in aid, economic cooperation, security, foreign policy, and national interest. Historically, Japan has emphasised fostering economic growth in recipient states through infrastructure development and the promotion of 'self-help' via capacity-building initiatives. This approach has been operationalised primarily through low-interest, long-term loans rather than grants, thereby encouraging sustainable development and fiscal responsibility. Sectoral priorities have centred on transport, public works, and utilities, often pursued through corridor-based development strategies.

Historically, Japan has emphasised fostering economic growth in recipient states through infrastructure development and the promotion of 'self-help' via capacity-building initiatives

Japan's comparative advantage lies in its technological expertise, particularly in high-speed rail and smart transport systems. Illustrative examples include Japan's role in constructing India's first high-speed railway and the fact that approximately 36% of Indonesia's railway system has been financed through Japanese ODA loans. Equally significant is Japan's capacity to support private-sector engagement in third countries through public-private partnerships, a domain in which it possesses world-class competencies.

At the institutional level, the Japan International Cooperation Agency (JICA) plays a pivotal role in advancing what has been termed the Japan Brand ODA. This framework integrates 'hard' assistance – such as capital investment financing, infrastructure construction, and preparatory measures for foreign direct investment – with 'soft' assistance, including technical cooperation and the

dissemination of production management and quality-control practices, notably the Kaizen method.³¹ While Southeast Asia and India remain the principal geographical foci, Japan's connectivity initiatives have increasingly extended to Africa and the Pacific Islands, underscoring the global scope of its development diplomacy.

While Southeast Asia and India remain the principal geographical foci, Japan's connectivity initiatives have increasingly extended to Africa and the Pacific Islands

Japan's connectivity policy is characterised by a multi-layered and integrated approach that embeds development within the broader framework of national policy, aligning it with security, economic, social, and environmental objectives. In Southeast Asia, this approach manifests across three interrelated dimensions. First, physical connectivity is advanced through the construction of on-land economic corridors designed to facilitate regional integration. The East–West Economic Corridor and the Southern Economic Corridor are both major transportation and logistics arteries seeking to improve connectivity over land from the Indian Ocean to the Pacific Ocean, linking Myanmar, Thailand, Laos, Cambodia, and Vietnam. Second, institutional connectivity is advanced via ventures such as the Japan–ASEAN Connectivity Initiative, which promotes customs clearance, seamless logistics flows, and human resource development through technical cooperation projects. Third, people-to-people connectivity is fostered through youth, cultural, and academic exchange programmes.

This comprehensive strategy is underpinned by extensive public-private collaboration, with strong partnerships between government institutions and private enterprises mobilising financial resources, technological expertise, and managerial capacity for development

³¹ Tetsushi Sonobe, "[Industrial development: Strategic assistance for 'Japan Brand ODA,'](#)" *Japan Institute for International Affairs*, March 2017. *Kaizen* refers to a business philosophy focusing on continuous, incremental improvement involving all members of a company or organisation to promote quality, efficiency, and productivity.

projects. In this way, Japan's connectivity policy exemplifies a holistic model that integrates infrastructure, regulatory frameworks, and societal linkages, positioning connectivity as both a developmental instrument and a strategic tool of foreign policy.

Japan's connectivity policy is a holistic model that integrates infrastructure, regulatory frameworks, and societal linkages, positioning it as a developmental instrument and a strategic tool of foreign policy

At present, Japan's connectivity policy is anchored in the New Plan for a Free and Open Indo-Pacific (New FOIP), in which multi-layered connectivity constitutes a central pillar.³² The policy document advances three major innovations: first, the introduction of new initiatives to strengthen connectivity in strategically significant regions; second, an enhanced emphasis on knowledge exchange and people-to-people linkages; and third, a pronounced focus on the digital domain. The realisation of FOIP is positioned as a core component of Japan's infrastructure export strategy, complementing its pursuit of economic growth through carbon neutrality and digital transformation, while simultaneously contributing to the resolution of social challenges and the achievement of the Sustainable Development Goals (SDGs) in partner countries.

Lastly, Japan's connectivity policy and distinctive ODA model strategically link aid, economic cooperation, security, foreign policy, and national interests. Over time, Japan has gradually 'securitised' its ODA, applying it more deliberately to promote regional stability since 2005. This trend accelerated under Prime Minister Abe's second administration (2012–20) and the guidance of the newly established

National Security Council, which explicitly sought to integrate ODA with foreign and defence policy – bringing together the 'three Ds' of development, diplomacy, and defence. China's increasingly assertive geopolitical posture provided the backdrop for this shift.

Historically, Japan's securitised ODA was confined to support for coast guards, law enforcement agencies, maintenance, and capacity-building. However, Japan's new security strategy of December 2022 introduced the concept of Official Security Assistance (OSA), allowing aid to extend to foreign armed forces.³³ Although the financial sums remain modest, their symbolic weight is considerable. These initiatives underscore Japan's determination to deter China, safe-guard critical sea lanes, and deepen engagement with developing nations in the global south – projecting both strategic resolve and soft power.

1.5. CONCLUSION

Connectivity has evolved from a descriptive condition of regional integration into a pivotal tool of geopolitical contestation and functional geography, where major powers compete to shape global norms and power relations through infrastructure and strategic networks. While China's BRI pioneered this strategic shift by embedding Sinocentric standards and increasingly security-oriented frameworks, major actors such as Japan, the EU, and India have responded with their own initiatives. Japan, in particular, has rolled out its own strategic connectivity policy, integrating ODA with its FOIP vision, transitioning from a focus on physical and institutional linkages to a more securitised approach.

³² Ministry of Foreign Affairs of Japan, "[New Plan for a "Free and Open Indo-Pacific,"](#)" Ministry of Foreign Affairs of Japan, 28 November 2023.

³³ See Chapter 2 in this Report.

2. CONNECTING THE INDO-PACIFIC

Wrenn Yennie Lindgren

2.1. JAPAN'S STRATEGIC CONNECTIVITY IN SOUTHEAST ASIA

Connectivity is a central part of Japan's FOIP vision that aims to connect and vitalise Asia and Africa.³⁴ It has also emerged as a buzzword in global affairs. However, our understanding of the various forms of connectivity and how they converge and diverge from each other over space and time remains limited. The concept of strategic connectivity – an important aspect of this understanding – has gained traction in recent years as it captures the often-sensitive geopolitical ambitions that underlie most connectivity initiatives.

While connectivity has always played a central role in Japan's broader ODA, its policy approach in the Indo-Pacific region has further emphasised specific connectivity initiatives, which often have a strategic angle. Under the second Abe administration (2012–20), Japan accentuated its contribution with the Partnership for Quality Infrastructure (2015) that underpinned connectivity projects and reinforced what has been described as “infrastructural means for strategic ends,” where national interest and security are explicitly in focus.³⁵ The Kishida administration (2020–24) unveiled both a revised Development Cooperation Charter (DCC) and a new OSA cooperation framework in June 2023, which promotes local capacity building through the provision of non-lethal defence equipment for like-minded countries in an effort to reinforce their security capacities and deterrence.³⁶ OSA focuses, in particular, on defensive support in surveillance, coastal

defence, and capacity building and has been described as an extension of Japan's FOIP. The scheme is blatant about its aim to “create a security environment desirable for Japan,”³⁷ whereas the DDC aims to “create a favourable international environment for Japan and the world.”³⁸

Although the newer OSA distinguishes itself from Japan's longstanding ODA, focused on the economic and social progress in developing countries, both schemes are understood to be “key strategic channels for increasing regional stability through cooperation.”³⁹ Moreover, many of the initial projects within the OSA framework relate to different types of connectivity and can be described as falling under an overarching umbrella of ‘defence connectivity’. The latter is fostered through not only the provision of physical resources, such as patrol boats or air surveillance radar systems, but is also envisaged as a proactive defence diplomacy that facilitates institutional linkages and involves trust- and capacity building. This is often essential for both interoperability and the actual usage and maintenance of the physically provided resources.⁴⁰

While initial recipients of OSA are largely concentrated in Southeast Asia (including the Philippines, Indonesia, Timor-Leste, and Malaysia), in 2025, it was announced that Tokyo would double the number of countries that receive aid under the scheme to engage newcomers such as Thailand, Tonga, Sri Lanka, East Timor, and Papua New Guinea.⁴¹ Japan's OSA budget has undergone significant increases since the schemes were launched, with the fiscal 2025 budget of ¥8.1 bn (\$56 mn) being over four times the size of the initial 2023 budget at ¥2 bn.⁴² Such an expansion in

³⁴ Wrenn Yennie Lindgren, “Old Sake, New Barrel? Japan's Free and Open Indo-Pacific Strategy,” in *Mind the Gap: National Views of the Free and Open Indo-Pacific* (The German Marshall Fund of the United States Asia Program Report 9, 2019), 35–40.

³⁵ Giulia Garbagni, “[Developmental Means for Strategic Ends: Japan's Infrastructure Diplomacy in Myanmar and the Wider Southeast Asia](#),” *Torino World Affairs Institute* Note N. 97 (March 2021).

³⁶ Ministry of Foreign Affairs of Japan, “[Official Security Assistance](#),” Ministry of Foreign Affairs of Japan PPT, February 2025.

³⁷ Ministry of Foreign Affairs of Japan, “[Official Security Assistance](#),” Ministry of Foreign Affairs of Japan PPT, April 2025.

³⁸ Ministry of Foreign Affairs of Japan, “[Development Cooperation Charter](#),” Ministry of Foreign Affairs of Japan, June 2023.

³⁹ Jumpei Ishimaru, “[Japan's shifting foreign-assistance schemes](#),” *IJSS Online Analysis*, 22 April 2024.

⁴⁰ Simran Walia, “[Japan's Official Security Assistance \(OSA\) Policy towards Southeast Asia](#),” *MP-IDS Commentaries*, 12 August 2025.

⁴¹ Christopher Woody, “[Japan Steps Up New Security Assistance to Countries Caught Between US and China](#),” *The Diplomat*, 8 July 2025.

⁴² Abishek Sharma and Gitanjali Sinha Roy, “Japan's Security Assistance in South Asia faces constraints. Friends can help,” *ASPI The Strategist*, 27 August 2025.

recipient countries and an increase in budget demonstrate Tokyo's commitment to pursuing strategic connectivity initiatives with countries that are part of critical trade routes and that face a deepening Chinese military presence.

An expansion in recipient countries and budget demonstrates Tokyo's commitment to strategic connectivity with countries that are part of critical trade routes and face a deepening Chinese military presence

However, in contrast to other assistance allocations (i.e., Japan's ODA budget for 2024 amounted to approximately \$16.8 bn⁴³), the OSA budget is notably low, with implications for the degree to which recipient countries can actually bolster their deterrence and defence connectivity, especially when taking into account how expensive some of the desired defence materials are. As such, it has been suggested that OSA can be seen as more of a symbolic gesture that does have an impact but is limited in its scope.⁴⁴

Combining hard and soft elements, multi-layered connectivity concerns not only quality infrastructure but also human, knowledge, and digital connectivity

Only a couple of months prior to the official launch of OSA by Japan's Ministry of Foreign Affairs, a revised FOIP vision, titled the New Plan for a Free and Open Indo-Pacific, was made public in March 2023. Due to changing international and domestic circumstances, there were a number of notable changes in the updated policy, which was reoriented to focus more on socio-economic development, including the addition of multi-layered connectivity as one of the four major pillars.⁴⁵

⁴³ Ministry of Foreign Affairs of Japan, "[Publication of Preliminary ODA Data of 2024](#)," Ministry of Foreign Affairs of Japan, 17 April 2025.

⁴⁴ John Bradford and Raymond Yamamoto, "[Japan's Official Security Assistance to Southeast Asia: Limited Scope, Real Impact](#)," *IDSS Paper*, 13 January 2025.

⁴⁵ Hiroaki Shiga, "[Kishida's Realism Diplomacy: Japan's Official Development Assistance Strategy](#)," *Center for Strategic and International Studies*, 8 June 2025; Ministry of Foreign Affairs Japan, "[New Plan for a 'Free and Open Indo-Pacific \(FOIP\)](#)," Ministry of Foreign Affairs Japan, March 2023.

Combining elements of hard and soft connectivity, multi-layered connectivity concerns not only the construction of quality infrastructure, such as roads, bridges, railways and Special Economic Zones, but also human, knowledge, and digital connectivity.⁴⁶ An all-encompassing term, multi-layered connectivity emphasises the need to acknowledge that connectivity, as we know it, has changed due to emerging technologies, geopolitics, and strategic interests and as such needs to be analysed in diverse forms. It can be interpreted as the culmination of various connectivity initiatives, whether structural or non-structural, short- or long-term, people- or technology-based. Several of the multi-layered connectivity projects that the New Plan introduced could be understood as having a strategic element: in that, they reflect not only Japan's commitment to promoting regional connectivity, trade, and infrastructure development but also "a means for achieving regional growth and as a counterweight to China's Belt and Road Initiative."⁴⁷

Given the historic developments in Japan's policy frameworks concerning both development assistance and security policy and the recurring theme of strategic connectivity over the past decade, several questions regarding how such initiatives are put into practice persist. For instance, how can we understand the strategic aspect of the different connectivities that make up multi-layered connectivity in the context of FOIP? What types of defence connectivity are being pursued via the OSA scheme, and how do they relate to other strategic connectivity initiatives within Japan's policy frameworks?

This chapter considers developments from both flagship and nascent connectivity projects in answering these questions. Geographically, attention is directed to Southeast Asia – a core region for Japan's ODA historically

⁴⁶ Wrenn Yennie Lindgren, "[Multilayered Connectivity in Practice: Japan's Free and Open Indo-Pacific in Southeast Asia](#)," FIIA Connectivity Conversations Webinar, 10 May 2023.

⁴⁷ Matthew Brummer, Kei Koga, and Wrenn Yennie Lindgren, "The Free and Open Indo-Pacific: Economics, Politics, and Norms," *Oxford Research Encyclopedia of International Studies* (2026 forthcoming).

and for FOIP and OSA contemporarily – and specifically to the Philippines, a key regional partner for Japan, where both multi-layered connectivity projects and OSA scheme projects are underway simultaneously.

2.2. NEW MULTI-LAYERED CONNECTIVITY AGENDA

The research agenda on connectivity has experienced a flurry of attention in recent years. As the concept has become more frequent and normalised in policy statements, high-level speeches, and dialogues, inquiry into how connectivity is envisioned, planned, and enacted in differing contexts and geographical locations has intensified. Contending connectivity initiatives are often analysed through a geopolitical lens, with emphasis on the role of connectivity providers seeking to muster local political influence and the realisation of projects that are often directly motivated by their national interests.⁴⁸ Extant analysis has been particularly focused on major initiatives – such as the BRI or the EU’s Global Gateway – and on tangible and structural connectivity, in particular infrastructure building in the form of ports, roads, bridges, railways, and special economic zones.⁴⁹ Recent scholarship has also considered more nascent multilateral initiatives, such as the EU-Japan Connectivity partnership, as well as ongoing initiatives, such as the G7’s Partnership for Global Infrastructure and Investment.⁵⁰ As the landscape of connectivity becomes increasingly complex due to the diversification of projects and geopolitical dynamics, concepts such as multi-layered connectivity bring forth the importance of

taking inclusive approaches that push beyond standard interpretations of how we should understand connectivity today.

Multi-layered connectivity, as described in the New Plan for FOIP (2023), is a core element for cooperation. Connectivity is seen as facilitating cooperation while also providing support for overcoming vulnerabilities in recipient countries.⁵¹ Interpreted as strategic, multi-layered connectivity involves several focused measures for enhancing both hard and soft pillars. For instance, the 2023 FOIP policy explains how it envisions this playing out in the case of the Japan-ASEAN Comprehensive Connectivity Initiative, unveiled by President Kishida in September 2023 as an upgrade of its namesake predecessor, first launched in November 2020.

The Japan-ASEAN Comprehensive Connectivity Initiative aims to enhance multi-layered connectivity through technical cooperation. It includes capacity-building projects for 5 000 individuals by 2027, as well as a number of projects in six areas: transport infrastructure, digital connectivity, maritime cooperation, supply chain resilience, electricity connectivity, and human and knowledge connectivity.⁵² These six key forms involve both structural and non-structural cooperation and are indicated as areas where Japan is expanding the scope of its efforts. Described as a “case” of multi-layered connectivity (Pillar 3 in FOIP 2023), the Initiative promises to “generate synergy by combining the land, sea and air corridor connectivity projects to strengthen physical connectivity and the technical cooperation projects to enhance institutional and people-to-people connectivity.”⁵³ How it actually does so, in terms of practical projects and the strategic aspects, is not as well-articulated. Three regions are in focus for multi-layered connectivity: Southeast Asia, South Asia, and the Pacific Islands Region. This chapter directs attention to Southeast Asia and to the case

⁴⁸ Bart Gaens and Ville Sinkkonen, “Contentious Connectivity – the USA, Japan, and the Free and Open Indo-Pacific,” *East Asia* 40 (2023): 265–291.

⁴⁹ Cheng-Chwee Kuik (ed), “Southeast Asian Responses to China’s Belt and Road Initiative,” *Asian Perspective* 45, no. 2. 2021; Tyyne Karjalainen, “European Norms Trap? EU Connectivity Policies and the Case of the Global Gateway,” *East Asia* 40 (2023): 293–316; Jeffrey Wilson, “Infrastructure Choices and the Future of the Indo-Pacific,” *Security Challenges* 16, no. 3 (2020): 64–68; Christian Echle (ed), *Responding to the Geopolitics of Connectivity: Asian and European Perspectives* (Konrad-Adenauer-Stiftung, 2023).

⁵⁰ Bart Gaens, “The EU-Japan Connectivity Partnership: Roadways and Roadblocks. Trames,” *Journal of the Humanities and Social Sciences* 27, no. 3 (2023): 199–218; Hong Yu, “G7’s Plan for Partnership for Global Infrastructure and Investment: An Alternative to the BRI?,” in *Understanding China’s Belt and Road Initiative. Asia in Transition*, vol. 26 (Springer, 2024).

⁵¹ Ministry of Foreign Affairs of Japan, “New Plan for a ‘Free and Open Indo-Pacific (FOIP),” Ministry of Foreign Affairs of Japan, March 2023.

⁵² Ministry of Foreign Affairs of Japan, “Japan-ASEAN Comprehensive Connectivity Initiative,” Ministry of Foreign Affairs of Japan, September 2023.

⁵³ Ministry of Foreign Affairs of Japan, “Pillar 3: Multi-layered Connectivity; Case (28): Japan-ASEAN Connectivity Initiative,” Ministry of Foreign Affairs of Japan, March 2023.

of the Philippines, where several OSA and multi-layered connectivity projects are being implemented and where there is often a geopolitically strategic aspect.

2.3. THE PHILIPPINES AS A SITE

Japan describes the Philippines as “a neighbour connected by the sea,” and after almost 70 years of diplomatic relations, the bilateral partnership has evolved into a “near-alliance.”⁵⁴ Japan and the Philippines have upgraded not only their defence ties by inking a reciprocal access agreement that went into force in September 2025, but also their commitment to future cooperation to promote infrastructure development through public-private partnerships, which will be further explored by the ongoing Japan–Philippines High-Level Joint Committee on Infrastructure Development and Economic Cooperation, established by Prime Minister Shinzō Abe in 2017. The Philippines–Japan Economic Partnership Agreement (PJEPA), signed in 2008, was the first bilateral free trade agreement (FTA) for the Philippines and remains important for solidifying the countries’ economic links.

Tokyo and Manila have pursued a bilateral strategic partnership since 2011, which was upgraded to a “strengthened strategic partnership” in 2015 under the Abe and Aquino III administrations. Connectivity and its strategic aspects feature prominently in both agreements. In the Action Plan for Strengthening of the Strategic Partnership, infrastructure development was highlighted as a central aspect of “collaboration for economic growth of the region.”⁵⁵ In addition to physical connectivity in the form of transport development for Metro Manila and its surrounding areas, digital connectivity that supports resilient, trusted, and secure ICT systems, as well as digital broadcasting, was emphasised. Now, a decade since the signing of the plan, bilateral dialogue, focused on how to

sustain the strengthened strategic partnership momentum in light of shifting geopolitical dynamics, takes place regularly. During the latest exchange at the foreign ministers’ level in October 2025, the importance of complementary arrangements, such as the Philippines–Japan–US Trilateral Cooperation and ASEAN Centrality, was highlighted.⁵⁶

Japan has historically been a key infrastructure partner for the Philippines and is, at present, the largest infrastructure investor as well as one of the main foreign contributors overall. Compared to China, Japanese infrastructure projects are preferable due to their reliability and high standard, while the Philippines’ political leadership claims to be the “right and trusted partner” for Japanese investments.⁵⁷

Compared to China, Japanese infrastructure projects are preferable due to their reliability and high standard

At the historic trilateral summit between the US, Japan, and the Philippines in April 2024, it was decided that Tokyo and Washington would step in to carry out the undertakings that were supposed to be Chinese-led but were abandoned due to a lack of interest from Beijing.⁵⁸ Another emerging minilateral structure that builds on the trilateral is the Squad, which involves the US and three mutual defence treaty partners (Japan, the Philippines, and Australia). In contrast to the Quadrilateral Security Dialogue (Quad), the Squad addresses traditional security issues and openly voices its deep concerns over China’s maritime activities in the South and East China Seas.

The extant analysis on connectivity in the Philippines has been primarily devoted to developing knowledge about maritime

⁵⁴ Ministry of Foreign Affairs of Japan, “Japan-Philippines Foreign Ministers’ Meeting and Working Lunch,” Ministry of Foreign Affairs of Japan, 28 May 2025.

⁵⁵ Ministry of Foreign Affairs of Japan, “Action Plan for Strengthening of the Strategic Partnership,” Ministry of Foreign Affairs of Japan, June 2015.

⁵⁶ Department of Foreign Affairs of the Republic of the Philippines, “Philippines and Japan Vice Foreign Ministers Meet to Sustain Momentum of the Strategic Partnership and Productive Bilateral Cooperation,” Department of Foreign Affairs of the Republic of the Philippines, 2 October 2025.

⁵⁷ Department of Finance of the Republic of the Philippines, “PH Assures Japan’s Investor Giants that it is the Right and Trusted Partner for Growth,” Department of Finance of the Republic of the Philippines, 11 September 2025.

⁵⁸ Alexandra Sakaki, “Japan in Southeast Asia: Countering China’s Growing Influence,” *SWP Research Paper*, June 2025.

connectivity initiatives, which are central to both multi-layered connectivity and OSA.⁵⁹ The Philippines is part of the first generation of OSA recipients, along with Malaysia, Bangladesh, and Fiji.⁶⁰ The initial grant aid in 2023 was worth ¥600 mn and provided a coastal radar system. The OSA package was expanded in 2024 to include rigid-hulled inflatable boats (RHIBs), coastal radar systems, and equipment to enhance maritime awareness capabilities.

Beyond OSA, less is known about the interplay with additional types of hard and soft connectivity and their strategic aspects. Manila is a close partner within the context of ASEAN in realising Japan's FOIP vision, and several relevant projects proposed under the auspices of the Japan–ASEAN Comprehensive Connectivity Initiative (2023) are taking place in and with the Philippines. For instance, non-structural cooperation involves human capacity building for key public functions and includes the strengthening of customs functions, road planning, and management, as well as public transport capacity in the capital region.

Moreover, Japanese contributions to the Philippines' rail transportation have featured prominently in bilateral cooperation. Japan is involved in the project on the "Formulation of 30-year Railway Master Plan for the Greater Capital Region" and has, for many years, participated in the training of rail advisors in project management, coordination, and maintenance. More recently, Japan helped establish the newly opened Philippine Railway Institute (PRI) and, via this entity, JICA has co-hosted the Philippine Railway Conference (PhilRailCon) since its inauguration in 2023. Such endeavours are important for the knowledge-sharing aspect of connectivity, as well as capacity building, and are a testament to the intertwining and layered feature of FOIP. In order to effectively use and maintain physical infrastructure – such as constructing and maintaining railroads – human connectivity

through capacity building and knowledge connectivity through the sharing of practical experiences are essential.

Considering developments from both flagship and nascent structural and non-structural multi-layered connectivity projects, relevant initiatives in the Philippines cross a number of domains that can be considered strategic: the Metro Manila Subway Project (infrastructure connectivity), the establishment of the Philippine Railway Institute (technical connectivity), digital terrestrial television broadcasting network development (digital connectivity), customs personnel capacity building (skills connectivity), and training programmes in Japan (knowledge connectivity).

Consideration should be given to how combining different connectivities can create synergies that lead to enhanced material, non-material, and strategic outcomes

In the future, consideration should be given to how combining different connectivities can create synergies that lead to enhanced material, non-material, and strategic outcomes.

Although the Philippines is a unique case of deepening defence connectivity with Japan and thus is arguably not representative of Tokyo's broader engagement in the region, it is important to examine both in terms of cooperation diversity and the geopolitical underpinnings. Compared to other actors such as Vietnam, Indonesia, or Thailand, cooperation with the Philippines is perceived to be more defence-focused and embedded in longstanding partnerships. This is attributed to the extensive history that Japan and the Philippines share, as well as to regional dynamics, including flashpoints such as the South China Sea. For Japan, engagement in the Philippines has been cited as a response to China's overtures, particularly with regard to the maritime space and freedom of navigation. In this complex geopolitical context, the Philippines' strategic posture has been described as a non-strategic hedging vis-à-vis China, where strategy is mired in bureaucratic politics and the convergence and divergence of policymakers' interests have great influence,

⁵⁹ Pratinashree Basu and Don Mclain Gill, "Strategic Diplomacy in the Indo-Pacific: The Case of Japan and the Philippines," *ORF Issue Brief* No 771, 9 January 2025.

⁶⁰ Pihla Kukkonen and Julie Yu-Wen Chen, "Japan's Official Development Assistance to the Philippines: Legitimizing a New Strategic Tool," *ISDP Issue Brief*, 17 September 2025.

on the one hand.⁶¹ On the other hand, it is explained as maintaining an offensive hedging strategy, where Manila weaponises limited alignment to accrue relative gains from great power competition.⁶²

In August 2025, Japan and the Philippines signed a Reciprocal Access Agreement (RAA), establishing procedures for cooperative activities by the defence forces. In October 2025, during the first exercise under the new RAA, the Japan Air Self-Defense Force and the Philippine Air Force practised disaster response in Cebu province in the aftermath of a destructive earthquake. The exercise marked a strategic upgrade in defence connectivity, as it facilitates interoperability and advances shared commitment to regional resilience and security. In 2026, the Philippines will serve as the chair of ASEAN; Tokyo and Manila will also mark 70 years of diplomatic relations. Considering this timing as well as the impetus for more minilateral engagement, such as the Japan–US–Philippines trilateral format and the Squad, prospects for enhancing defence connectivity via OSA and the various multi-layered connectivity projects seem highly plausible.

2.4. CONCLUSION

Japan's evolving FOIP envisions multi-layered connectivity at the centre of its regional strategy, blending physical infrastructure with human, digital, and knowledge-based cooperation. Under the Abe and Kishida administrations, Japan expanded its traditional development assistance into more explicitly strategic domains, most notably through the OSA scheme, which provides non-lethal defence equipment and capacity building to like-minded states. Although modest in budget, OSA reflects Japan's strategic intent to shape a favourable security environment amid intensifying geopolitical competition

– particularly with China. The Philippines stands out as a key site where Japan's strategic connectivity agenda is unfolding across multiple domains. The Philippines' own strategic posture, ranging from bureaucratic hedging to selective alignment, creates fertile ground for Japan's multi-layered connectivity initiatives, which blend defence cooperation, technical training, and institutional linkages.

The Philippines' own strategic posture, ranging from bureaucratic hedging to selective alignment, creates fertile ground for Japan's multi-layered connectivity initiatives

How other major players in the region, such as India, will lend to further cooperation in strategic and multi-layered connectivity will be an interesting topic to follow.⁶³ For instance, the Bay of Bengal serves as a vital sub-theatre of the Indo-Pacific, where Japan is concentrating its efforts through initiatives such as the Northeast India–Bay of Bengal Industrial Value Chain. This venture is conceived as a multi-layered connectivity project, encompassing both structural and non-structural dimensions.⁶⁴

Moving forward, despite the emergence of connectivity as a buzzword in international relations over the past decade and the proliferation of policy frameworks and updates coming from Tokyo, there remains a limited understanding of how the different types of connectivity, which make up multi-layered connectivity, and OSA are being realised, or how they converge and diverge from each other over space and time. This is important for deepening our knowledge about strategic connectivity, which should be studied as a culmination of Japan's policy initiatives, as well as about how different types of connectivities interact. Furthermore, research about the strategic aspect of these connectivities and the agency of partner states on the receiving end of connectivity initiatives should be pursued.

⁶¹ Wen Zha, "Hedging Without Strategy: Bureaucratic Politics, Strategic Environment and the Reorientation of the Philippines' China Policy," *Contemporary Southeast Asia: A Journal of International and Strategic Affairs* 47, no. (2025), 33–66.

⁶² Jomari Jesus G. Tan. "Crouching Tiger, Hidden Dragon: An Offensive Realist Reconsideration of Philippine Grand Strategy," *Asian Politics and Policy* 17, no. 3 (2025): 1–13.

⁶³ See Chapter 3 in this report.

⁶⁴ Ministry of Foreign Affairs of Japan, "Pillar 3: Multi-layered Connectivity, Case (29) Development of an Industrial Value Chain connecting the Bay of Bengal and North Eastern Regions of India," Ministry of Foreign Affairs of Japan, March 2023.

We need not only more research on the complementary and competing forms of connectivity in order to explore the nuances of engagement, implementation, and reception, but also case studies of failure to learn from past mistakes. Specifically, new knowledge regarding how we understand different types of connectivity (i.e., knowledge, digital, physical, maritime) and, in particular, the tangible and non-tangible distinction in multi-layered connectivity would be insightful. Probing different types of connectivity through various stages of their life cycles, including how they have been conceptualised, constructed, utilised, and perceived. Researching such topics will increase awareness about the Indo-Pacific region's different forms of connectivity in practice and the challenges that they face, and thus offer opportunities for improvement and refinement.

Large-scale connectivity initiatives have a poor track record when it comes to the inclusion of recipient states in the participation or control of the processes

Extant scholarship suggests that large-scale connectivity initiatives have a poor track record when it comes to the inclusion of recipient states in the participation or control of the processes that create values, norms, and standards of connectivity.⁶⁵ This finding has implications for the legitimation of connectivity projects as well as for their outcomes. Therefore, it is exceedingly important to consider how multi-layered connectivity and OSA are perceived by recipient countries and thus to understand the challenges from the latter's perspective.

In the coming decades, improving the outcomes of connectivity initiatives in the Indo-Pacific region, which are crucial to fostering a prosperous, inclusive, open, and interlinked space from Asia to Africa, will be imperative. Multi-layered connectivity addresses various aspects of connectivity and how their interplay can be capitalised on to sustain the well-being of the populations in Indo-Pacific countries when it comes to mobility, health, economic security, safety, digital access, and knowledge production.

⁶⁵ Tyyne Karjalainen, "European Norms Trap? EU Connectivity Policies and the Case of the Global Gateway," *East Asia* 40 (2023): 293–316.

While the future for OSA might seem promising given its expanding resources and breadth, the implementation of the scheme in the coming years will not only depend on what Japan puts into it but also on how it is received by partner countries and seen by the broader international community. Further, as has been noted elsewhere, Japan's heavy promotion of quality infrastructure may not always appeal to recipient countries.⁶⁶ As such, connectivity that is non-tangible but has an impact on rule-setting in the Indo-Pacific should be emphasised and promoted. To make such an endeavour realistic, the evaluation of ongoing soft connectivity initiatives and their outcomes, both positive and negative, should be pursued and shared with relevant stakeholders.

Identifying cumulative patterns of practices and policies in the pursuit of a more connected

Indo-Pacific region – when it comes to the well-studied physical connectivity aspect as well as the crucial soft infrastructure aspect – will be important in the pursuit of understanding how different connectivities actually connect in a strategic way.

Developing land and maritime corridors and transportation networks is only one part of the connectivity equation. Equally important is enhancing knowledge connectivity, which is itself a development of human connectivity, by combining youth initiatives, experience, entrepreneurs, and investors with digital connectivity. Moreover, providing the technical assistance that facilitates the actual use and maintenance of connectivity sites is essential for the durability, efficiency, and optimisation of connectivity initiatives. For the EU and Europe more broadly, learning from Japan's experience in multi-connectivity could be meaningful to developing the Global Gateway.

Although multi-layered connectivity, as a concept, has arguably never gained traction among policymakers and academics, it does still speak to the dynamic interplay between connectivities emphasised in FOIP. The possibility that Japan is reorienting from a multi-layered connectivity strategy toward a layer-specific emphasis merits further attention.

⁶⁶ Hisahiro Kondoh, "Japan's Strategic Interests in the Global South," *Strategic Japan Report by Center for Strategic and International Studies*, 21 May 2024.

3. STRATEGIC COLLABORATION OR GEOPOLITICAL DISCOURSE?

Bart Gaens

Connectivity partnerships and infrastructure alliances have become integral components of the foreign-policy toolkit of major actors, premised on the rationale that international cooperation enables the pooling of resources, the leveraging of mutual strengths, and greater traction in advancing norms and standards. In 2019, the European Union and Japan signed the Partnership on Sustainable Connectivity and Quality Infrastructure in Brussels. Preceding that, at the African Development Bank (AfDB) meeting in 2017, Japan and India launched the Asia–Africa Growth Corridor (AAGC), aimed at fostering economic, technological, and infrastructure development across the Indo-Pacific and Africa. More recently, in 2025, the two countries agreed to the Japan–India Cooperation Initiative for Sustainable Economic Development in Africa. Collectively, these reflect a strong political commitment to joint action and collaboration with, and within, third countries.

The chapter assesses the effectiveness of these partnerships as strategic geopolitical instruments. It begins by examining Japan’s connectivity initiatives with like-minded partners, focusing specifically on cooperation with India and the EU. The discussion then turns to the challenges and obstacles that hinder collaboration, highlighting the persistent gap between ambitious agenda-setting and practical implementation. The chapter concludes by presenting a set of policy recommendations aimed at strengthening future cooperation.

3.1. JAPAN’S CONNECTIVITY PARTNERSHIPS

In its connectivity efforts, Japan’s new FOIP policy places strong emphasis on advancing connectivity through cooperation with international partners.⁶⁷ At the bilateral level,

⁶⁷ Ministry of Foreign Affairs of Japan, “[New Plan for a “Free and Open Indo-Pacific,”](#) Ministry of Foreign Affairs of Japan, 28 November 2023.

it seeks to reinforce mutually complementary initiatives with the United States, Australia, India, South Korea, Canada, and Europe. At the mini- and multilateral level, it aims to leverage frameworks such as the Quad, the Japan–US–Korea trilateral, and the G7. The policy is driven by multiple imperatives: countering authoritarian challenges to the rules-based international order; safeguarding open sea lanes and supply security; identifying complementarities and synergies in transport, energy, and digital connectivity; jointly promoting sustainability, inclusiveness, and transparency for recipient countries; advancing regulatory frameworks, standardisation, and certification; streamlining customs procedures; addressing digital and green transformations; and fostering research collaboration and knowledge connectivity.

This section examines two distinct cases of Japan’s connectivity partnerships, both of which take the form of triangular arrangements. In such partnerships, two actors commit to cooperating in a third country or region, thereby extending their collaborative reach beyond bilateral engagement.⁶⁸

3.1.1. INDIA

An early example of Japan’s pursuit of triangular connectivity partnerships is its engagement with India. The Special Strategic and Global Partnership, established in 2014, has advanced considerably, underpinned by robust trade and investment ties, including a recent pledge of \$68 bn in investment over the next five years. Security cooperation has also deepened, encompassing high-level military dialogues, defence unit exchanges, a Visiting Forces Agreement (VFA), bilateral naval exercises, an Acquisition and Cross-Servicing Agreement (ACSA), a defence equipment and technology transfer framework, and an Information Sharing Agreement (ISA). Beyond the bilateral dimension, Japan and India collaborate through trilateral formats – such as the India–Japan–US and India–Japan–Australia

⁶⁸ The underlying idea of triangular cooperation (TC) has been put to practice in development aid. It concerns a development collaboration model that involves three main parties: a donor country or organisation, a pivotal country with relevant expertise or experience, and a beneficiary country. Through TC the traditional donor nation (a developed nation) assists South-South cooperation.

dialogues – as well as the quadrilateral framework (the Quad), initially active in 2007–08 and relaunched in 2017.

In the realm of connectivity, the Asia–Africa Growth Corridor (AAGC), launched in 2017, generated considerable expectations. Designed to promote economic, technological, and infrastructure development across the Indo-Pacific and Africa, the initiative was reported to have pooled \$40 mn, despite the absence of concrete implementation plans.⁶⁹ The AAGC was heralded as “a new model of bilateral and triangular cooperation, where partners combine their strengths to advance regional and global growth,” and was widely perceived as a potential alternative to China’s BRI.⁷⁰

The AAGC was launched with three core objectives: first, to advance India’s and Japan’s individual and joint outreach to the African continent, with a particular emphasis on “quality infrastructure investment”; second, to connect Africa with the Indian Ocean Region (IOR) within a broader Asia–Africa framework, positioning Japan and India as leading actors while incorporating African countries into the decision-making process;

The Asia–Africa Growth Corridor has remained largely aspirational and lacking concrete implementation plans, a division of responsibilities, a schedule, and dedicated institutions

and third, to contribute to the shaping of a liberal, value-based Indo-Pacific order. In practice, however, the AAGC has failed to deliver on these ambitions. The initiative has remained largely aspirational, confined to the level of a vision document, and lacking concrete implementation plans, a clear division of responsibilities, a structured work plan or schedule, and dedicated institutions to

drive progress.⁷¹ While triangular cooperation between Japan and India in third countries does exist, it has been limited either to business-to-business (B2B) collaboration or to parallel projects with minimal integration. For instance, in Sri Lanka, Japan and India are separately advancing LNG-related infrastructure, while in Bangladesh, India is engaged in road construction and Japan is extending ODA loans to enhance railway capacity.

The AAGC was not entirely devoid of results, as two lower-profile initiatives emerged in its wake. First, in 2019, a private-sector framework was introduced through the Platform for Japan–India Business Cooperation in the Asia–Africa Region, designed to encourage commercial collaboration. Second, at the diplomatic level, India and Japan established the Act East Forum (AEF) in 2017, with the dual purpose of fostering development in India’s Northeastern Region (NER) and enhancing connectivity both within the region and between it and Southeast Asia. The latter initiative is particularly significant, as it envisions improved trade and logistics linkages between India and Bangladesh via India’s Northeast.

The Japan–India Summit of August 2025 marked a renewed effort to advance cooperation. Central to the Summit was the adoption of a Joint Vision for the Next Decade, which outlined collaboration across a wide spectrum of areas, including the economy, economic security, mobility, environment, technology and innovation, health, people-to-people exchanges, and state–prefecture engagement. Complementing this vision, the two countries issued a joint declaration on security cooperation and unveiled an Action Plan for Japan–India Human Resource Exchange and Cooperation. A further highlight was the announcement of the Japan–India Economic Security Initiative, designed to protect and strengthen supply chains in critical goods and sectors.⁷² Earlier in February 2025,

⁶⁹ Sreeparna Banerjee and Pratinashree Basu, “[India–Japan Partnership in Third Countries: A Study of Bangladesh and Myanmar](#),” *Issue Brief, Observer Research Foundation (ORF)* 29, 19 April 2021.

⁷⁰ Anita Prakash, “Asia Africa Growth Corridor: Development cooperation and connectivity in the Indo-Pacific,” *Economic Research Institute for ASEAN and East Asia Policy Brief*, 3 October 2018, 7.

⁷¹ Takuya Taniguchi, “[Should We Forget about the Asia–Africa Growth Corridor?](#),” *Lettre du Centre Asie* 87, 19 October 2020.

⁷² Ministry of Foreign Affairs of Japan, “[15th Japan–India Annual Summit Joint Statement](#),” Ministry of Foreign Affairs of Japan, 29 August 2025.

at the Japan–India–Africa Business Forum in Tokyo, the two partners launched the “Japan–India Cooperation Initiative for Sustainable Economic Development in Africa.” This initiative pursues a dual objective: first, to promote the industrial concentration of Japanese companies in India, thereby creating an industrial hub to expand trade and investment flows toward Africa; and second, to stimulate private investment, job creation, and human resource development across Africa. By integrating the growth markets of India and Africa into Japan’s economic activities, the initiative seeks to reinforce supply chains.⁷³

3.1.2. THE EU

In December 2017, the European Union and Japan finalised negotiations on an Economic Partnership Agreement (EPA), marking a milestone in their bilateral engagement. Concluded in parallel, the Strategic Partnership Agreement (SPA) established a binding political framework, underscoring the shift toward a more comprehensive approach that integrates economic diplomacy with political and security dimensions. A first tangible outcome of the SPA was the Partnership on Sustainable Connectivity and Quality Infrastructure, signed in September 2019.⁷⁴ The implementation of this EU–Japan Connectivity Partnership has been identified as a key driver in advancing the EU’s Indo-Pacific strategy.⁷⁵ The partnership seeks to promote sustainable, comprehensive, and rules-based connectivity and quality infrastructure, consistent with both parties’ commitment to shared values such as democracy, the rule of law, and respect for human rights, while simultaneously addressing global challenges, including climate change, digital transformation, and geopolitical stability.

⁷³ Torunika Roy, “[India-Japan cooperation in Africa: A new era of economic engagement](#),” *Council for Strategic and Defence Research*, 7 March 2025.

⁷⁴ European External Actions Service, “[The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan](#),” European External Actions Service, 27 September 2019.

⁷⁵ European Union, “[The EU strategy for cooperation in the Indo-Pacific. Joint Communication to the European Parliament and the Council](#),” European Union, 16 September 2021.

Broadly, the EU and Japan agreed to “work together on all dimensions of connectivity, bilaterally and multilaterally, including digital, transport, energy and people-to-people exchanges.” The partnership further articulated a strong political will to cooperate with and within third countries. With careful consideration of partner countries’ needs, demands, fiscal capacity, and debt sustainability, the EU and Japan pledged to “ensure synergies and complementarity between their respective cooperation on connectivity and quality infrastructure with partner third countries and coordinate action, notably in the regions of the Western Balkans, Eastern Europe, Central Asia, Indo-Pacific, as well as in Africa.”⁷⁶

The EU and Japan have identified synergies, complementarities, and avenues for cooperation across Southeast Asia, the Pacific, Central Asia, and Africa, yet no projects have been formally designated

The EU and Japan have, both jointly and independently, identified extensive synergies, complementarities, and potential avenues for cooperation across Southeast Asia, the Pacific, Central Asia, and Africa. Yet, to date, no projects have been formally designated or recognised as tangible outcomes of the Partnership. As asserted by Pacheco Pardo and Pejsova:⁷⁷

“The lack of any tangible outcome since the partnership was launched in 2019 is a source of tension between the EU and Japan (and within the EU), in a relationship that otherwise does not have any significant friction points. It is necessary for the EU to reach a decision on its level of commitment to this initiative.”

What did occur was essentially a rebranding exercise, reflected in the compilation of a factsheet highlighting four complementary projects: the West Africa Growth Ring, the Northern Corridor, the Southern African Power Pool (SAPP), and the Trans-Caspian

⁷⁶ European External Actions Service, “[The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan](#),” European External Actions Service, 27 September 2019.

⁷⁷ Ramon Pacheco Pardo and Eva Pejsova, “Deepening EU-Japan cooperation: In-depth analysis,” *European Parliament Think Tank*, 10 November 2024, 36.

Transport Corridor (TCTC).⁷⁸ Although the EU and Japan are, to varying degrees, engaged in these large-scale initiatives, no direct cooperation between them has yet taken shape. The practice of relabelling existing projects has been criticised as a characteristic feature of the early phase of the Global Gateway.⁷⁹

The most recent EU–Japan summit in 2025 placed its primary emphasis on security and defence cooperation, as well as on economic security, culminating in the launch of the EU–Japan Competitiveness Alliance. The Connectivity Partnership received only a passing reference. In the annex, both sides affirmed “that a sizeable number of projects illustrate existing EU–Japan complementarity between their respective cooperation on sustainable connectivity and quality infrastructure with their partners,” and further noted “that synergies will be sought on more such connectivity projects in the future.”⁸⁰

3.2. A STRATEGIC FORECAST

This section examines Japan’s connectivity partnership policy from two complementary perspectives: first, its significance in international diplomacy and policy relevance; and second, its effectiveness and practical impact.

3.2.1. IDEAS, INTERNATIONAL DIPLOMACY, AND POLICY RELEVANCE

Drawing on discursive institutionalism, a distinction can be made between policy ideas, programmatic ideas, and philosophical ideas grounded in broader worldviews.⁸¹ Within Japan’s connectivity policy, “quality infrastructure” and “quality infrastructure

investment (QII)” have stood out as hallmark policy ideas since at least 2015. These concepts refer to (investment in) infrastructure that is geared towards sustainable economic growth and is inclusive, efficient, resilient, and integrates social and environmental considerations.

Beginning in 2016, Japan gradually subsumed the concepts of quality infrastructure and connectivity under the broader programmatic framework of FOIP. Initially launched as an explicit strategy in response to China’s BRI, FOIP was subsequently toned down and rebranded as a ‘vision’ in 2018, following criticism from ASEAN members that the

Initially launched as an explicit strategy in response to China’s BRI, FOIP was toned down and rebranded as a ‘vision’

original framing suggested a major-power rivalry with China. In concrete terms, FOIP advances three sets of principles: the rule of law, freedom of navigation, and free trade; economic prosperity, including through enhanced connectivity; and peace and stability, particularly via maritime security and law-enforcement capacity-building. As a programmatic idea, FOIP carries an implicit geopolitical agenda. As former Prime Minister Fumio Kishida remarked in a policy speech:⁸²

“In order to achieve growth, countries need to stay connected in various aspects. However, the kind of connection that relies solely on one country could be a breeding ground for political vulnerability. By connecting, we aim for increasing each country’s options, help[ing] them overcome their vulnerabilities and pursu[ing] economic growth.”

Delivered in India, the speech was firmly grounded in the notion that Japan can provide developing countries, including those in the global south, with broader strategic options – positioning itself as an alternative to China and Russia.

⁷⁸ European Commission, “[Factsheet: EU-Japan Connectivity Partnership](#). European Commission, Directorate-General for International Partnerships,” European Commission, 1 July 2025.

⁷⁹ Emma Du Chatinier, “[Too little funding. European companies are pulling back from Africa, expert warns](#),” *EU Perspectives*, 3 November 2025.

⁸⁰ European Commission, “[EU-Japan Summit \(Tokyo, 23 July 2025\). Joint Statement](#),” Council of the European Union, 23 July 2025.

⁸¹ Vivien A. Schmidt, “Discursive institutionalism: Understanding policy in context,” in Frank Fischer, Douglas Torgerson, Anna Durnová, and Michael Orsini (ed), *Handbook of critical policy studies* (Edward Elgar Publishing, 2015).

⁸² Fumio Kishida, “[The future of the Indo-Pacific, Japan’s new plan for a ‘Free and Open Indo-Pacific’ Together with India, as an indispensable partner](#),” Ministry of Foreign Affairs of Japan, 20 March 2023.

FOIP is underpinned by philosophical ideas rooted in worldviews and broad concepts tied to normative values and moral principles.⁸³ These encompass a liberal-democratic identity and a commitment to a rules-based international order, alongside concepts such as quality infrastructure, sustainability,

Shared values and principles provide the basis for ‘tailored networking’ with partners across the Indo-Pacific

inclusiveness, and transparency. They rest on the presumption that a shared normative foundation and common values serve as key facilitators of cooperation. FOIP policy papers continue to emphasise that shared values and principles provide the basis for ‘tailored networking’ with partners across the Indo-Pacific. Japan’s vested interests in maintaining the regional status quo – ensuring continued US engagement and countering Chinese attempts to revise territorial or maritime boundaries in the East and South China Seas – further reinforce this normative framing. Values and principles thus play a central role in mobilising support to safeguard the existing order. The same appeal to shared values also underpins broader regional constructs, such as the idea of a ‘Broader Asia’, which envisions the Indo-Pacific as a maritime region linking India more closely into the regional fold and connecting the Indian and Pacific Oceans.

Japan’s proclaimed “realism diplomacy for a new era” is explicitly designed to avoid exclusion, the creation of camps, or the imposition of value

At the same time, Japan adopts a pragmatic stance and refrains from preaching or imposing values. Tokyo recognises that an overly strong emphasis on normative principles can prove counterproductive, as counterpart countries may prefer engagement with more pragmatically oriented partners. Japan’s proclaimed “realism diplomacy for a new era” is explicitly designed to avoid exclusion, the creation of camps, or the imposition of values.

⁸³ Schmidt, “Discursive institutionalism.”

This approach has become central to Japan’s engagement with partners in the Global South, notably India and ASEAN member states.

In the case of Japan and the EU, values-based rhetoric serves to consolidate ranks against authoritarian challenges to the international rules-based order. The Japan–EU Connectivity Partnership has successfully established a framework for strategic cooperation, intended to balance China’s growing presence across regions from Europe to Africa.

The EU adopted its own Indo-Pacific strategy in 2021.⁸⁴ Japan and India are described as “two countries with a common vision of a free, open, peaceful, prosperous, and coercion-free Indo-Pacific region based on the rule of law,”⁸⁵ while Japan and the EU “firmly share values and principles such as the rule of law, fundamental freedoms, democracy, human

Japan and India share concerns about the emergence of a Sino-centric regional economic order through China’s BRI

rights, and open, free and fair trade.”⁸⁶ At the level of international diplomacy, such discursive strategies function as critical signifiers of geopolitical alignment among like-minded partners. Japan and India, in particular, share concerns about the emergence of a Sino-centric regional economic order through China’s BRI. For Japan, India is regarded as an indispensable partner in advancing its FOIP vision, not least through the Indo-Pacific Oceans’ Initiative (IPOI) launched by Prime Minister Narendra Modi in 2019, within which Japan assumes leadership of the connectivity pillar.

⁸⁴ European Union, “[The EU strategy for cooperation in the Indo-Pacific. Joint Communication to the European Parliament and the Council](#),” European Union, 16 September 2021.

⁸⁵ Ministry of Foreign Affairs of Japan, “[Japan-India Joint Vision for the Next Decade: Eight Directions to Steer the Special Strategic and Global Partnership](#),” Ministry of Foreign Affairs of Japan, 29 August 2025b.

⁸⁶ Council of the European Union, “[EU-Japan Summit \(Tokyo, 23 July 2025\). Joint Statement](#),” Council of the European Union. 23 July 2025.

3.2.2. EFFECTIVENESS AND IMPACT

While alignment through strategic connectivity can be considered successful at the institutional level – reflected in numerous summits, declarations, and memoranda of understanding – the tangible results on the ground have remained underwhelming. Institutional structures, practices, and political realities have significantly constrained the depth of cooperation between Japan and the EU, and to a lesser extent, between Japan and India. Four key factors help explain this general misalignment.

First, **national branding, self-interest, and domestic considerations** can obstruct deeper cooperation. Tokyo remains eager to promote its own model of connectivity and development cooperation, placing strong emphasis on sharing Japan’s development experience with recipient countries and advancing Japanese-style approaches such as the *Kaizen* method of product quality improvement, particularly in Africa. The European Union, by contrast, seeks to advance its own connectivity brand through the Global Gateway. A recent factsheet on the partnership with Japan from July 2023 states that:⁸⁷

“The EU–Japan Partnership on Sustainable Connectivity and Quality Infrastructure aims to promote trusted, sustainable and rules-based connectivity that brings lasting benefits and creates sustainable and inclusive growth in partner countries. To this end, the European Union and Japan will continue to make tangible cooperation offers under the Global Gateway, the Japan Development Cooperation Charter and their respective strategies for cooperation in the Indo-Pacific.”

The most recent factsheet (July 2025) reconfirms this observation, underscoring the persistence of parallel branding efforts.⁸⁸

India’s Act East policy places particular emphasis on the development of its Northeastern region as a means of strengthening connectivity with South-east Asia. Yet the policy remains financially dependent on Japan. Japanese investments in

the Matarbari Port Development Project, undertaken within the framework of the Bay of Bengal Industrial Growth Belt (BIG-B) and centred on Bangladesh, hold significant potential for facilitating access for landlocked Northeast India. However, the once promising triangular cooperation among India, Bangladesh, and Japan has unravelled following the end of Sheikh Hasina’s administration in 2024. The deterioration of India–Bangladesh relations, triggered by concerns over the treatment of the Hindu minority in Bangladesh, has undermined the viability of this trilateral initiative.⁸⁹

Second, **institutional fragmentation** manifests in bureaucratic complexity, uneven capacities, and divergent working cultures across national agencies. The European Union is particularly renowned for its complex institutional architecture, encompassing the Commission, the European External Action Service (EEAS), and multiple Directorates-General (DGs), such as DG MOVE (mobility and transport), DG CONNECT (digital), and DG INTPA (international partnerships), alongside the European Parliament. These overlapping structures generate bureaucratic challenges, including varying lengths of internal funding application procedures and differing capacities among national agencies. Development agencies and investment banks, for instance, operate with distinct requirements and working methods, and not all are well equipped to engage effectively with external partners. Divergences also arise in terms of standards and approaches, ranging from risk-averse to more pragmatic orientations. Finally, recipient countries themselves may hesitate to engage in multi-party frameworks, either due to the

Recipient countries themselves may hesitate to engage either due to the added bureaucratic burden or as a deliberate strategy to hedge their bets and enhance bargaining power

added bureaucratic burden or as a deliberate strategy to hedge their bets and enhance bargaining power by playing one actor against another.

⁸⁷ European Union, “[EU-Japan Connectivity partnership](#),” European Union, July 2023.

⁸⁸ Council of the European Union, “[EU-Japan Summit \(Tokyo, 23 July 2025\). Joint Statement](#),” Council of the European Union, 23 July 2025.

⁸⁹ Purnendra Jain, “[The Japan-India-Bangladesh strategic triangle unfastened](#),” *IDE Policy Brief* no 210, 19 February 2025.

A third obstacle lies in **discourse fragmentation**. While there is broad agreement that private-sector engagement is essential, government-to-government (G2G) rhetoric has not effectively translated into incentives at the corporate level. Japanese companies maintain a strong presence in Europe, India, and Africa, yet the overarching discourse has failed to generate clear benefits for business actors. In the case of the AAGC, the concept was arguably too broad and vague, misaligned with commercial interests, and offered little tangible value to firms. As a result, the private sector lacked motivation to press governments for implementation. Similarly, within the Japan–EU partnership, the current focus remains insufficiently specific to provide concrete advantages or incentives for private-sector participation. Consequently, cooperation has largely remained confined to B2B interactions rather than evolving into structured, government-backed initiatives.

Asymmetric initiatives appear more promising in terms of translating political commitments into corporate involvement

Furthermore, initiatives such as the Global Gateway – and, by extension, the EU–Japan partnership – have thus far failed to provide sufficient funding or risk-mitigating capital. They remain burdened by cumbersome bureaucratic procedures and tendencies toward micromanagement, which have contributed to the withdrawal of European companies from regions such as Africa.⁹⁰ By contrast, Japan’s development model places greater emphasis on supporting its private sector, including strategic venture capital enterprises, by coupling investment with capacity-building, technology transfer, and consistent policy backing from the government.⁹¹ Looking ahead, asymmetric initiatives appear more promising in terms of translating political commitments into corporate involvement. One example is the Japan–India Cooperation Initiative for Sustainable Economic Development in Africa, which seeks

⁹⁰ Emma Du Chatinier, “[Too little funding. European companies are pulling back from Africa, expert warns](#)”, *EU Perspectives*, 3 November 2025.

⁹¹ Samir Bhattacharya, “[Japan’s strategic game in African venture capital](#)”, *East Asia Forum*, 8 November 2025.

to leverage Japanese companies operating in India to establish an industrial hub for trade and investment directed toward Africa.

A final challenge concerns the broader **shift away from Connectivity with a capital ‘C’** toward more narrowly defined, connectivity-related cooperation – particularly in the field of security. In its partnership with India, Japan has increasingly emphasised, first, economic security, including strategic trade and technology, and second, people-to-people connectivity through human resource exchange. In its engagement with the European Union, the focus has shifted to, first, the Security and Defence Partnership, encompassing defence industry dialogue, maritime security, and the forthcoming Security of Information Agreement (SIA); and second, economic security through the Japan–EU Competitiveness Alliance, with particular attention to supply chain resilience and digital initiatives such as Arctic connectivity and submarine cable projects.

3.3. CONCLUSION

Connectivity partnerships have become integral components of the foreign policy toolkit of major actors, as illustrated by the Japan–India and Japan–EU ‘connectivity alliances.’ These frameworks seek to pool resources, advance shared norms, and counter competing narratives and initiatives. Japan promotes connectivity under the FOIP vision, emphasising the rule of law, sustainability, and resilience – an implicitly geopolitical instrument designed to balance

Connectivity partnerships have become integral components of the foreign policy toolkit of major actors

China’s BRI. With India, the AAGC, launched in 2017, stalled due to weak implementation. Recent initiatives have shifted toward economic security, supply chain resilience, and Africa-oriented industrial hubs.⁹² Japan’s partnership with the EU, grounded in the EPA

⁹² Ministry of Foreign Affairs of Japan, “[Japan-India Joint Vision for the Next Decade: Eight Directions to Steer the Special Strategic and Global Partnership](#)”, Ministry of Foreign Affairs of Japan, 29 August 2025.

and SPA, failed to produce flagship projects despite political alignment, even though a few ongoing projects were rebranded as foci for the partnership.

Policymaking circles appear to be shifting away from broadly defined connectivity toward more narrowly conceptualised forms in the spheres of security, digitalisation, and competitiveness

Key hurdles to cooperation include institutional fragmentation and bureaucratic obstacles, national branding conflicts, and weak private-sector engagement stemming from insufficient funding, limited risk mitigation, and unclear incentives. At the same time, policymaking circles appear to be shifting away from broadly defined connectivity toward more narrowly conceptualised forms of connectivity in the spheres of security,

digitalisation, and competitiveness. This trend is evident in Japan's partnerships with both India and the European Union. Most recently, in 2025, Japan and India concluded an Action Plan for Human Resource Exchange and Cooperation, a Japan–India Economic Security Initiative designed to protect and strengthen supply chains in critical goods and sectors, and a Japan–India Cooperation Initiative for Sustainable Economic Development in Africa. A similar narrowing of focus is visible in Japan–EU relations, where the emphasis now lies on supply chain resilience and critical minerals under the Japan–EU Competitiveness Alliance; digital cooperation, including alignment on data governance and Arctic connectivity projects such as commercially viable submarine cables; and defence cooperation under the Security and Defence Partnership, encompassing defence industry dialogue, cybersecurity, and maritime security.

4. INTEGRATING JAPAN INTO THE INDIA–MIDDLE EAST–EUROPE ECONOMIC CORRIDOR

Jagannath Panda

The India–Middle East–Europe Economic Corridor has attracted intense diplomatic attention and analytical debate since its announcement, even as its future direction remains uncertain and institutionally undefined. Despite the lack of a clear roadmap, IMEC continues to gain traction because it represents something rare in today's geopolitical environment: a potential reconfiguration of commercial and energy flows that bypass traditional chokepoints and potentially offer an alternative to China's entrenched connectivity dominance. Yet, this

IMEC represents a potential reconfiguration of commercial and energy flows that bypass traditional chokepoints and offer an alternative to China

traction is shadowed by a paradox. The Middle East, through which IMEC must physically and politically pass, is experiencing one of its most volatile periods in recent decades. The Gaza war, Red Sea insecurity, and the fragility of normalisation processes have not only disrupted regional logistics networks but also cast doubt on whether IMEC can mature into a stable, long-term connectivity architecture. Middle Eastern instability does not merely slow IMEC; it shapes how global actors perceive its feasibility.

It is within this fragile equation that Japan emerges as an indispensable actor. Tokyo's credibility as a high-quality infrastructure provider, its balanced diplomacy with both Arab states and Israel, and its longstanding development role across Asia and Africa give it the unique ability to temper geopolitical risk while strengthening IMEC's operational foundation. This raises a central question: Can IMEC realistically evolve into a durable and trusted corridor without the stabilising weight, institutional discipline,

and development-focused connectivity that Japan brings? A related question is: in a region where political volatility routinely derails mega-projects, is Japan the only actor capable of ensuring IMEC's long-term governance, implementation quality, and financial sustainability? The central argument of this paper is that Japan's involvement is not optional but essential; its entry could shift IMEC from an aspirational announcement to a resilient connectivity framework capable of withstanding Middle Eastern volatility. This chapter, therefore, assesses IMEC's origins, regional constraints, US and Indian strategic calculations, and why Japan's integration could decisively determine the corridor's long-term strategic relevance.

4.1. CONTEXTUALISING IMEC'S STRATEGIC SIGNIFICANCE

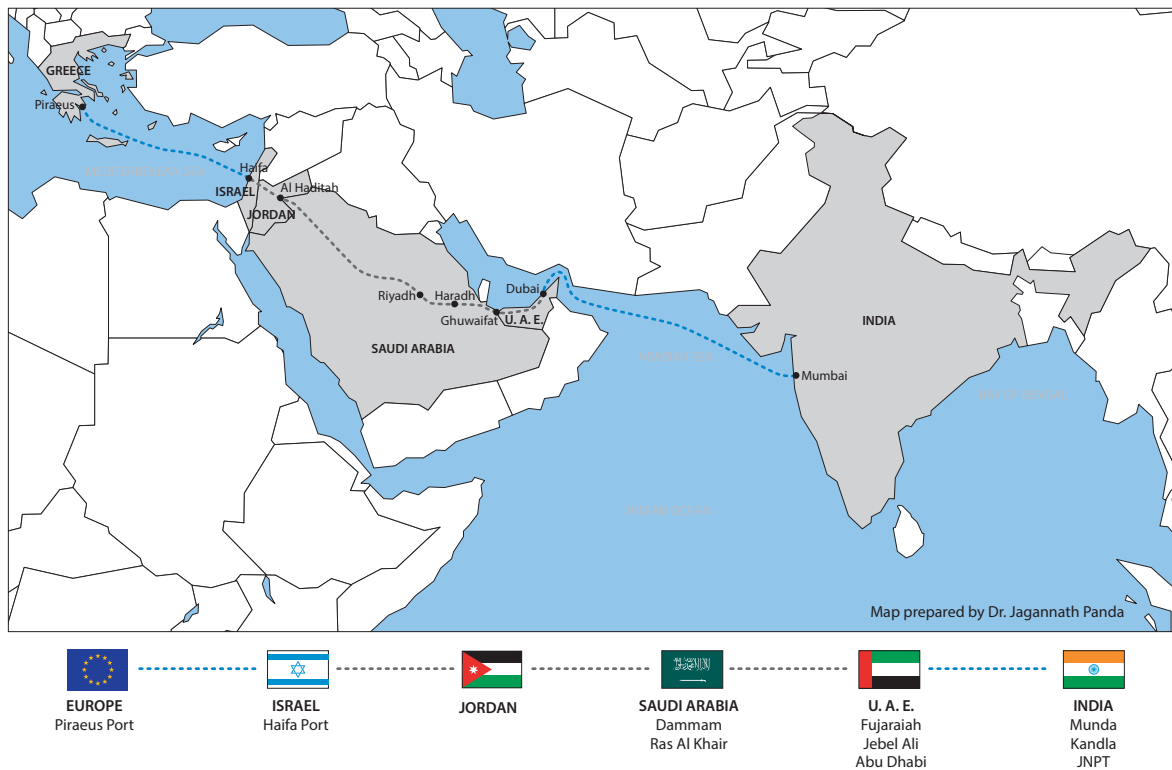
IMEC grew out of the I2U2 (India, Israel, the UAE, the US) minilateral grouping, conceived in 2021 to promote connectivity, clean energy, and tech cooperation. National security advisers from the US, India, Saudi Arabia, and the UAE met in

Riyadh in May 2023 to lay the groundwork, before the formal launch on the sidelines of the G20 in New Delhi in September 2023.⁹³ An MoU on IMEC was signed by India, the US, Saudi Arabia, the UAE, the EU, France, Germany, and Italy, with European leaders

IMEC is best understood as a US-initiated, India-centred, Gulf-anchored corridor, later Europeanised through Global Gateway, but not yet Indo-Pacific-wide

calling it "historic" and India projecting it as the basis of future world trade. Thus, IMEC is best understood as a US-initiated, India-centred, Gulf-anchored corridor, later Europeanised through Global Gateway, but not yet Indo-Pacific-wide, given the absence of Japan and other Asian middle powers.

⁹³ Research and Information System for Developing Countries, "[India-Middle East-Europe Economic Corridor \(IMEC\) Strategic Choices and Way Forward](#)," Research and Information System for Developing Countries, March 2025.



Map 1. The India–Middle East–Europe Economic Corridor. *Source:* The Author.

The United States has been the political engine behind IMEC from inception. The corridor was unveiled in September 2023 as a flagship project under the G7’s PGII, with President Joe Biden personally framing it as a “really big deal” and an explicit alternative to China’s BRI.⁹⁴ A series of White House fact sheets and G7 communiqués enshrined IMEC as part of a broader US-led connectivity agenda, linking it to supply-chain resilience, clean energy, and digital infrastructure. However, American leadership has been primarily political and conceptual: Washington has offered convening power, diplomatic cover, and strategic narrative, while expecting the EU, Gulf partners, India, and private finance to shoulder most of the capital and implementation burden.

Under the second Trump administration, that leadership has become more ambiguous. Analyses of US-led connectivity initiatives argue that Trump’s America First instincts, the president’s scepticism towards large multilateral development schemes, and his focus on tariffs and bilateral deals make it unlikely that he will devote significant new

resources or political capital to PGII-style corridors such as IMEC.⁹⁵ Some commentaries note that IMEC occasionally appears in Trump–Modi talking points or in advocacy pieces urging Trump to seize IMEC as a ‘win’, but there is no evidence of a detailed Trump-era implementation plan, new US funding commitments, or institutional follow-through.⁹⁶ *De facto*, IMEC has slipped from being a centrepiece of Biden’s connectivity diplomacy to a low-salience, low-investment item under Trump, formally endorsed but not substantively driven.

But one must recall that IMEC was conceived in a period of intense global flux, marked by the Russo-Ukrainian war, supply chain realignments, and the geopolitical contest between the US-led democracies and China’s authoritarian economic expansion. The corridor’s western branch, running through the Arabian Peninsula into Europe, and its eastern branch connecting India to the Gulf via shipping routes (see Map 1) together form a network intended to reduce transit

⁹⁴ European Council, “G7 Hiroshima Leaders’ Communiqué,” European Council, May 2023.

⁹⁵ See Chapter 5 in this Report.

⁹⁶ David Makovsky, “Resilience and Roadblocks: The Abraham Accords at Five Years,” *Policy Notes: The Washington Institute for Near East Policy*, No. 161 (September 2025).

time, logistical costs, and geopolitical risks.⁹⁷ Preliminary studies by India's Ministry of Commerce suggest that IMEC could reduce freight costs between India and Europe by nearly 30%, translating into billions in annual trade savings.⁹⁸

For India, this is not merely an economic advantage; it is a strategic imperative to diversify beyond the Red Sea-Suez chokepoint, through which four-fifths of its Europe-bound exports currently pass.⁹⁹ For Europe, IMEC promises energy diversification, reduced dependence on Russia, and expanded access to Indian and Middle Eastern markets. For Gulf States such as Saudi Arabia and the UAE, the corridor aligns with their national visions, Vision 2030 and Centennial 2071, respectively, focused on diversification, logistics, and sustainable energy.

The Gaza war had a direct bearing on IMEC's viability. During the conflict, multiple analyses warned that Israel's war on Gaza and the broader 'Axis of Resistance' strategy of targeting Israeli ports and Red Sea shipping were 'destroying' the corridor's feasibility by making the eastern Mediterranean segment politically and commercially unviable. Investors faced a double risk: reputational exposure from association with Israel during a highly contentious war, and operational exposure from physical disruptions to ports and shipping lanes.¹⁰⁰ This period effectively froze progress on IMEC and triggered renewed debate on alternative routings, including greater reliance on Egypt and the Suez ecosystem.

The subsequent ceasefire and the more recent diplomatic emphasis on 'reviving' IMEC have reduced immediate political risk but have not eliminated structural vulnerabilities.¹⁰¹ Commentaries now frame the Gaza truce as

reopening the conversation around IMEC, especially when combined with Saudi moves on rail connectivity, but stress that long-term viability still depends on a durable settlement of the Palestinian question and a broader regional de-escalation. Egypt's foreign minister has explicitly linked progress on IMEC to resolving the Palestine issue, while signalling Cairo's interest in joining the project – a stance that both underlines the corridor's dependence on political stability and points to an emerging re-routing logic that might dilute Israel's centrality.

In this environment, any Japanese decision to engage, if it eventually materialises, will be shaped not only by Tokyo's FOIP and quality-infrastructure doctrines, but also by its risk calculus on whether the Gaza ceasefire ushers in a sustainable political settlement or merely a fragile pause in a structurally unstable theatre.

Japanese decision to engage will be shaped by its risk calculus on the Gaza ceasefire

4.2. JAPAN'S OUTLOOK AND CONSIDERATIONS

Japan's relationship with IMEC, so far, remains strikingly underdeveloped at the level of public policy signalling. Although Japan was present at the 2023 G20 leaders' event in New Delhi, where IMEC was launched under the PGII umbrella, Tokyo did not sign the IMEC MoU and has since avoided any formal declaration that it wishes to join the corridor. Unlike in areas such as FOIP or quality infrastructure, there is no major Japanese policy speech, strategy document, or Diet debate in which IMEC features as a core plank of Japan's external economic agenda.

This relative silence is mirrored in the domestic information space: Japanese commentary has noted that when Japanese media mention IMEC, they often confuse it with the Belgian semiconductor research institute with the same acronym, and coverage of the corridor itself is described as "virtually non-existent." External analyses, European, Indian, and US, frequently list Japan as a potential partner to be brought into IMEC or associated projects, but these are proposals about Japan rather

⁹⁷ Jyoti Vij, "India - Middle East- Europe Economic Corridor: A new global binding force," *Gulf News*, 19 July 2025.

⁹⁸ Ministry of Commerce of the Government of India, "India's Export Trends 2023–24," Ministry of Commerce of the Government of India, 2024.

⁹⁹ Eric Le Borgne, "The Deepening Red Sea Shipping Crisis: Impacts and Outlooks," *MENA FCV Economic Series Brief 2* (World Bank, February 2025).

¹⁰⁰ See Chapter 3 of this report.

¹⁰¹ Suhasini Haidar, "Amidst Gaza ceasefire, India revives diplomatic outreach for economic corridor with West Asia, Europe," *The Hindu*, 31 January 2025.

than expressions of intent from Tokyo. In short, there is at best a latent or indirect interest, not a clearly articulated governmental ambition to join IMEC.

There is at best a latent or indirect interest, not a clearly articulated governmental ambition to join

Tokyo acknowledges IMEC's strategic significance and aligns with the corridor's goals of sustainable, rules-based connectivity. Yet Japan has stopped short of declaring an intention to join. Several factors explain this caution. Japan's domestic fiscal constraints, compounded by demographic ageing and rising defence expenditure, make large-scale overseas commitments difficult. IMEC's institutional architecture is currently vague, lacking a secretariat, governance model, or financing structure – conditions Japan generally requires before joining any multilateral initiative. Furthermore, Japan's Indo-Pacific commitments already stretch from Southeast Asia to the Pacific Islands, leaving limited bandwidth for new, high-risk ventures. Above all, Japan remains wary of the Middle Eastern volatility. Tokyo generally avoids committing to infrastructure in politically unstable environments unless it has high confidence in long-term predictability.

While Japan maintains stable relations with Israel, its economic and energy security dependence lies overwhelmingly with the Gulf and increasingly with Egypt, a country Tokyo has consistently supported through infrastructure loans, energy partnerships, and governance programmes. Egypt's location at the Suez nexus, its extensive port modernisation initiatives (such as Ain Sokhna and Alexandria), and its capacity as a stable state actor make it a natural candidate for an IMEC expansion or parallel routing. Japan is, therefore, far more likely to support a diversified Mediterranean segment. For Tokyo, redundancy is not just a logistical choice but a geopolitical safeguard.

An important question that arises in this context is whether Japan would support an IMEC route that bypasses Israel or includes Egypt. The Gaza conflict has complicated discussions on land-based transit between

Israel and Saudi Arabia, raising doubts about the viability of the corridor's envisioned northern branch. Japan would almost certainly favour whichever route offers the greatest stability and continuity. Israel was initially conceived as a central logistics node in the east–west Mediterranean chain. But regional events since late 2023 have rendered Israel a highly volatile actor in any long-term connectivity architecture. The Gaza war, repeated missile exchanges involving Iran-backed groups, disruptions to Red Sea maritime traffic, and political uncertainty inside Israel collectively undermine the predictability that IMEC requires. If bypassing Israel enhances predictability and reduces exposure to conflict, Tokyo may not oppose it. Conversely, the inclusion of Egypt is likely to attract Japanese support because Egypt provides immediate infrastructure capacity, established links to Europe, and a direct continental entry point into Africa. Egypt's inclusion would also bring it closer to the envisioned global south orientation of the AAGC, making IMEC more compatible with Japan's development philosophy.

Beyond geopolitical recalibration, Japan also brings a suite of development assets that IMEC currently lacks but urgently needs

Beyond geopolitical recalibration, Japan also brings a suite of development assets that IMEC currently lacks but urgently needs. While IMEC is often framed through the lens of big-ticket infrastructure, the more challenging task is the corridor's long-term governance, regulatory coherence, and institutional interoperability across India, the Gulf, and Europe. This is precisely where Japan's comparative advantage lies.

4.3. WHY JAPAN MATTERS TO IMEC

Japan's relevance becomes clearer when compared to the AAGC, the joint Indo-Japanese initiative launched in 2017, which has made little progress yet.¹⁰² AAGC, unlike

¹⁰² Hardeep S Puri, Hidetoshi Nishimura, "[Asia Africa Growth Corridor – Partnership for Sustainable and Innovative Development](#)," African Development Bank Meeting, May 2017.

IMEC, is explicitly framed around the development needs of the global south. It focuses on Africa, emphasising human capital development, institutional strengthening, local participation, and long-term capacity building. It avoids geopolitical signalling and prioritises local ownership. IMEC, by contrast, has not articulated a comparable global south vision. Its founding documents focus on logistics efficiency, renewable energy pipe-lines, and trade facilitation, but not capacity building or institutional development. This contrast matters because Japan's infrastructure model is fundamentally rooted in co-creation-training, skills enhancement, technical cooperation, and customs simplification. If Japan enters IMEC, it can help the corridor express a development philosophy it currently lacks, giving the project a long-term sustainability dimension that goes beyond strategic signalling.

If Japan enters IMEC, it can help the corridor express a development philosophy giving the project a long-term sustainability dimension that goes beyond strategic signalling

Japan's potential contributions to IMEC will extend far beyond financing and technology. Japan is one of the few actors with deep expertise in customs facilitation, border management, and regulatory harmonisation, areas that IMEC must integrate if it hopes to function as an interoperable connectivity network. A corridor of this scale requires standardised procedures across ports, railways, and digital platforms. Japan has experience in establishing 'single window' customs systems across Southeast Asia and improving trade logistics through capacity building rather than coercive conditionalities. Such soft infrastructure is indispensable for IMEC, whose success will depend less on the construction of tracks and ports than on the alignment of trade procedures, data systems, and regulatory frameworks across three continents.

This role gains further importance when considering Japan's diplomatic posture in the Middle East. Unlike western actors, Japan has maintained stable relations with Israel

while simultaneously cultivating long-term partnerships with Saudi Arabia, the UAE, and Iran. This diplomatic neutrality is not merely symbolic; it gives Tokyo access across political divides. Where US involvement can be polarising, Japan is perceived as a non-intrusive, reliable development partner. In the context of IMEC, which must negotiate passage through politically divided geographies, Japan's balanced diplomacy provides a stabilising anchor.

Japan's integration into IMEC would also reshape the corridor's geopolitical narrative. IMEC has been criticised in some quarters as an anti-China proposition. Japan's participation would help mitigate that perception, as Tokyo's connectivity diplomacy focuses more on quality and sustainability rather than geopolitical confrontation. Japan's presence would frame IMEC as a multilateral cooperation platform rather than a containment mechanism. It would also create financing synergies by linking IMEC with the EU-Japan connectivity partnership, the Global Gateway, and Japan's PQI. This triangulation would give IMEC a more robust and transparent governance structure.

At the same time, Japan's involvement would expand IMEC's economic geography eastward, linking East Asian production hubs to West Asian logistics and European markets. This would reinforce the corridor's utility and create a trilateral production network that enhances supply chain resilience. Through Japan's guidance, IMEC could adopt secure data flows and standards that protect digital supply chains across Asia, the Gulf, and Europe.

Japan's presence would frame IMEC as a multilateral cooperation platform rather than a containment mechanism

Japan's potential participation in IMEC should not be viewed as supplementary, but as strategic. Notably, Tokyo brings a blend of capital, credibility, and technological know-how that could make IMEC a practical reality rather than a rhetorical vision. Unlike China's BRI, Japan's overseas development model has always prioritised quality infrastructure,

debt sustainability, and inclusive growth.¹⁰³ The Expanded Partnership for Quality Infrastructure (EPQI), launched by Tokyo in 2015 and expanded globally in 2019, underscores these principles and has become a global benchmark for sustainable development finance.

Furthermore, what is important to note here is that Japan's adherence to transparent financing mechanisms, local stakeholder participation, and environmental safeguards could help institutionalise best practices within IMEC. Moreover, Japan's diplomatic neutrality, especially its balanced relations with both Israel and Arab Gulf states, makes it a uniquely acceptable actor in a region otherwise divided along ideological and sectarian lines. Tokyo's integration would also align IMEC with the broader Indo-Pacific narrative of free and open connectivity, complementing the strategic visions advanced by India, the EU, and the US.

Tokyo's integration would align IMEC with the broader Indo-Pacific narrative of free and open connectivity, complementing the strategic visions advanced by India, the EU, and the US

Through its ODA, the JICA and the Japan Bank for International Cooperation (JBIC) have financed major infrastructure across Southeast and South Asia. Unlike China's state-directed BRI model, Japan relies on public-private partnerships that foster local capacity and long-term institutional development.¹⁰⁴ This approach could serve as a governance template for IMEC, where financing transparency and debt sustainability remain unresolved. Additionally, Japan's extensive experience in developing smart ports, railways, and renewable energy projects – ranging from Vietnam's metro systems to India's Delhi-Mumbai Industrial Corridor – could directly inform IMEC's

¹⁰³ Ministry of Foreign Affairs of Japan, "[Partnership for Quality Infrastructure](#)," Ministry of Foreign Affairs of Japan, 2016; Ministry of Foreign Affairs of Japan, "[Official Development Assistance \(ODA\)](#)," Ministry of Foreign Affairs of Japan, 10 May 2023.

¹⁰⁴ Japan International Cooperation Agency, "[JICA 2023 Annual Report](#)," Japan International Cooperation Agency, 2023.

implementation strategy. The inclusion of Japanese agencies in the project's design and execution would lend both credibility and technical sophistication to IMEC's operations.

Japan's role in global connectivity architecture has never been limited to financing or engineering. Its most influential contribution has been its emphasis on capacity building, institutional strengthening, and long-horizon economic governance.¹⁰⁵ Through JICA, JBIC, Asian Development Bank (ADB) partnerships, and various ODA programmes, Japan has spent decades training customs officials, designing port governance frameworks, establishing special economic zones with transparent regulatory structures, and supporting industrial corridors with local skill development at their core. These softer but indispensable elements of connectivity make Japan not just a financier but a normative architect.

IMEC, despite its ambitious scope, has not yet articulated how it will harmonise customs procedures, facilitate single-window systems, integrate digital trade platforms, or ensure regulatory interoperability across jurisdictions. Japan's experience in ASEAN, particularly with the ASEAN

Single Window, customs automation in Vietnam and Indonesia, and logistics reforms in Thailand, provides a ready-made template for IMEC. Tokyo's practical expertise in customs facilitation, port management, digital compliance systems, and cross-border supply chain transparency could help convert IMEC from a physical corridor into a genuinely efficient trade ecosystem.

Japan's experience in ASEAN provides a ready-made template for IMEC

Additionally, Japan also brings strong credentials in digital governance and data security, areas that IMEC must eventually incorporate if it wants to position itself as a 21st-century connectivity model rather than a traditional transport corridor. Japan's leadership in 5G

¹⁰⁵ Organisation for Economic Co-operation and Development, "[Development Co-operation Profiles: Japan](#)," Organisation for Economic Co-operation and Development, 11 June 2025.

security standards, AI regulation, and digital supply chain integrity (as outlined in its Cybersecurity Strategy 2023) aligns directly with India’s Digital Public Infrastructure (DPI) revolution and Europe’s emphasis on privacy, regulatory oversight, and data integrity. If IMEC is to develop digital corridors alongside physical ones, Tokyo’s participation will be critical for designing interoperable, trusted, and secure technological systems.

The final pillar shaping Japan’s potential role in IMEC relates to the United States. Washington’s position on IMEC is dual-layered. On one level, the US sees IMEC as a geopolitical counterweight to China – an alternative to BRI that links democracies and strategic partners across Eurasia. This explains why IMEC was formally elevated under the PGII. Yet, on another level, the US contribution is deliberately light-touch: Washington does not envision itself financing or managing IMEC, nor does it intend to commit substantial public resources beyond diplomatic endorsement and private capital mobilisation.

The US can offer political alignment, but only Japan can supply the combination of development finance, technical proficiency, infrastructural credibility, and region-neutral legitimacy to operationalise IMEC

This creates a structural gap that Japan is uniquely positioned to fill. The US can offer political alignment, but only Japan can supply the combination of development finance, technical proficiency, infrastructural credibility, and region-neutral legitimacy necessary to operationalise IMEC. Unlike the US, Japan is seen as a non-antagonistic actor in the Middle East and does not evoke fears of strategic dependency. Its involvement, therefore, mitigates geopolitical anxieties, strengthens the corridor’s development logic, and bridges the gap between US strategic intent and the financial and institutional capital needed to realise that intent.

4.4. JAPAN-EU CONVERGENCE AND THE GLOBAL GATEWAY

The EU-Japan strategic partnership continues to deepen and intensify. Based on the mutual respect for free and open trade and the need for green energy transition, it continues to make new forays in international politics and sustainable energy consumption. Fostering improved economic resilience and enhanced security, Japan has been working in close coordination with the EU to achieve common shared objectives.¹⁰⁶

The EU-Japan partnership has evolved into a cornerstone of global connectivity governance

The EU-Japan partnership has evolved into a cornerstone of global connectivity governance. Their 2016 EPQI established a framework for collaboration among the EU, the World Bank, the ADB, and JICA.¹⁰⁷ This partnership was reaffirmed at the 30th EU-Japan Summit in Tokyo in July 2025, where leaders emphasised transparent, high-standard infrastructure financing.¹⁰⁸ Japan and the EU also collaborate under the Global Gateway, an EU initiative to mobilise €300 bn for sustainable connectivity.¹⁰⁹ The complementarity between Japan’s EPQI and the EU’s Global Gateway underscores a shared commitment to rule-based global development. Integrating Japan into IMEC would operationalise this trans-continental partnership, creating a triangulated alignment among Japan’s EPQI, India’s DPI, and Europe’s Global Gateway. Such convergence would transform IMEC into not just a trade corridor but a digital and energy corridor linking democracies through standards, trust, and interoperability.

What is important not to overlook here is that Japan’s integration into IMEC would also bring advanced digital governance frameworks.

¹⁰⁶ European External Action Service, “[EU-Japan Strategic Partnership](#),” European External Action Service, July 2023.

¹⁰⁷ Ministry of Foreign Affairs of Japan, “[Partnership for Quality Infrastructure](#),” Ministry of Foreign Affairs of Japan, 2016.

¹⁰⁸ Council of the European Union, “[EU-Japan Summit \(Tokyo, 23 July 2025\). Joint Statement](#),” Council of the European Union, 23 July 2025.

¹⁰⁹ European Commission, “[Global Gateway](#),” European Commission, updated 10 October 2025.

Tokyo's leadership in 5G, robotics, and AI safety complements India's strength in software and Europe's regulatory expertise. Collaborations like the Tokyo AI-Terex Ventures partnership (2024) that promotes cross-border AI investments across Japan, India, and the UAE demonstrate the feasibility of digital integration.¹¹⁰ Furthermore, Japan's Cybersecurity Strategy 2023 prioritises secure data flows and digital supply chain protection – essential elements for a corridor that aspires to be the digital spine of three continents. The establishment of data exchange mechanisms under IMEC could also support emerging sectors like fintech, e-commerce, and health-tech, reinforcing digital interdependence across Asia, the Gulf, and Europe.

Against this backdrop, Japan's participation or integration into IMEC can multiply its effectiveness by combining financial discipline, technological leadership, and a reputation for ethical development partnerships.

4.5. THE GEOPOLITICAL CALCULUS

Japan's strategic chemistry with India remains the crux of Japan's potential participation in IMEC as a possible economic actor. Japan and India's strategic partnership represents one of the most stable bilateral relationships in Asia. The 2018 India–Japan Vision Statement elevated their cooperation to a Special

Japan and India's strategic partnership represents one of the most stable bilateral relationships in Asia

Strategic and Global Partnership, underpinned by shared values of democracy, rule of law, and open trade.¹¹¹ Their cooperation extends from infrastructure to digital ecosystems, exemplified through initiatives like the Global IndiaAI Mission 2024 and semiconductor collaborations.¹¹² They have also worked

¹¹⁰“[Terex Ventures, Ai Community launch \\$200m India-Japan investment](#),” *Techinasia*, 3 July 2025.

¹¹¹Ministry of External Affairs of the Government of India, “[India–Japan Vision Statement](#),” Ministry of External Affairs of the Government of India, 29 October 2018.

¹¹²“[India, Japan Collaborate for Safe and Trustworthy AI Development: Hiroshi Yoshida](#),” *Silicon India*, 3 July 2024.

together on third-country infrastructure in Southeast Asia and Africa. Integrating Japan into IMEC would consolidate this synergy, enabling a trilateral production and supply chain network among Japan, India, the Gulf, and Europe. Such a structure would enhance the corridor's economic logic by linking Japanese innovation, Indian manufacturing, and European markets through a secure and predictable Middle Eastern route.

Likewise, Japan's foreign policy in the Middle East has long been pragmatic, emphasising stability and energy security over ideological alignment. Over 90% of Japan's crude oil imports originate from the Gulf, making the region indispensable to its economic security.¹¹³ However, in the past decade, Tokyo has diversified its Middle East diplomacy to include renewable energy, green hydrogen, and digital partnerships.¹¹⁴ The Green Transformation (GX) initiative announced in 2023 includes hydrogen cooperation with Saudi Arabia's NEOM project and renewable energy ventures with the UAE.¹¹⁵ By integrating into IMEC, Japan could help accelerate the corridor's proposed hydrogen pipeline linking India, the Gulf, and Europe. Moreover, Japan's non-interventionist posture and developmental diplomacy make it an acceptable partner to both Iran and Gulf monarchies, enabling it to mediate regional connectivity with less friction. This aligns with IMEC's spirit of functional cooperation over political confrontation.

Ultimately, Japan is the indispensable stabiliser that IMEC needs. In the absence of Japanese involvement, IMEC risks remaining an aspirational blueprint, symbolically powerful but operationally uncertain. With Japan, the corridor gains credibility, predictability, and development-oriented sustainability. As geopolitical competition intensifies and Middle Eastern dynamics remain volatile, Japan's

¹¹³Ministry of Economy, Trade and Industry of Japan, “[Energy White Paper 2024](#),” Ministry of Economy, Trade and Industry of Japan, June 2024.

¹¹⁴Kiriko Honda, “[Japan and the Middle East: Japan can be a bridge in an era of global fragmentation and conflict](#),” World Economic Forum, 25 April 2024.

¹¹⁵Ministry of Economy, Trade and Industry of Japan, “[Sector-specific Investment Strategies' Compiled as Effort for Specifying Investment Promotion Measures for the Realization of GX](#),” Ministry of Economy, Trade and Industry of Japan, 22 December 2023.

entry could transform IMEC into a flagship model of multilateral connectivity cooperation, reflecting an alignment of Asian pragmatism, European institutional governance, and American strategic incentives. The question is no longer whether Japan fits into IMEC, but whether IMEC can succeed without Japan.

The question is no longer whether Japan fits into IMEC, but whether IMEC can succeed without Japan

Strategically, Japan's entry would recast IMEC as a multilateral cooperation platform rather than a containment bloc. It would temper narratives of IMEC being an 'anti-China' alliance by foregrounding functional development and connectivity. Economically, Japan's involvement could unlock blended financing mechanisms combining JICA, ADB, and sovereign wealth funds from the Gulf, thus ensuring project continuity. This would address one of IMEC's major constraints, its current dependence on western public financing cycles.

Japan's integration would create a trilateral production network connecting Japanese innovation, Indian labour, and European markets, effectively reshaping Eurasian trade flows

Additionally, Japan's integration would extend the corridor's economic geography eastward, linking East Asian production hubs to West Asian logistics and European markets. It would create a trilateral production network connecting Japanese innovation, Indian labour, and European markets, effectively reshaping Eurasian trade flows. Such integration aligns with the broader Indo-Pacific Economic Framework's goal of fostering resilient supply chains and secure critical mineral access.¹¹⁶

Despite strong complementarities, Japan's integration into IMEC faces political, institutional, and economic challenges. First, Tokyo's fiscal constraints, exacerbated by demographic

pressures and domestic economic priorities, limit its ability to commit to large-scale overseas projects. Second, IMEC lacks any permanent institutional architecture or secretariat, complicating coordination across multiple stakeholders. Third, Japan's security commitments under the US–Japan alliance and its Indo-Pacific engagements in Southeast Asia may compete for bureaucratic attention.

Additionally, IMEC's financing mechanisms remain ambiguous, with estimates suggesting the hydrogen corridor alone could cost upwards of \$600 mn, as the absolute minimum.¹¹⁷ Finally, regional instability in the Middle East, ranging from Iran–Israel tensions to conflict spillovers, poses operational risks that could dissuade long-term investment. Overcoming these hurdles requires strategic clarity, joint feasibility studies, and policy synchronisation among India, Japan, and the EU.

The strategic case for Japan's participation remains compelling despite these challenges.

Japan brings the ability to synchronise standards across continents, improve customs harmonisation, develop human capital, and institutionalise transparency in procurement and financing. These soft-infrastructure strengths are precisely what IMEC lacks in its current form. Japan's inclusion would significantly reduce the corridor's vulnerability to political shocks and would help ensure that IMEC remains not merely a geopolitical construct but a functional, sustainable, and interoperable connectivity framework.

4.6. CONCLUSION

In sum, to actualise IMEC as a transformative connectivity framework, Japan's integration should be pursued through a phased, pragmatic roadmap. First, India, Japan, and the EU should establish a joint IMEC dialogue mechanism to institutionalise coordination and monitoring. Second, IMEC should harmonise

¹¹⁶ Organisation for Economic Co-operation and Development, "Global Value and Supply Chains," Organisation for Economic Co-operation and Development, n.d.

¹¹⁷ Afaq Hussain and Nicholas Shafer, "The India-Middle East-Europe Economic Corridor: Connectivity in an era of geopolitical uncertainty," *Atlantic Council*, 27 August 2025.

its standards with G7's PGII and Japan's quality infrastructure principles to ensure consistency in procurement, debt transparency, and sustainability. Third, Japan's private sector,

Japan's integration should be pursued through a phased, pragmatic roadmap

including conglomerates like Mitsubishi, Hitachi, and Sumitomo, should be encouraged to co-invest in IMEC-linked logistics and green energy projects, leveraging blended finance with Gulf sovereign wealth funds. Fourth, IMEC should prioritise digital corridors and renewable energy pipelines as early deliverables to demonstrate tangible impact. Finally, Japan's inclusion should be framed not merely as a strategic counterbalance to China but as a constructive effort to build an open, inclusive, and rule-based Indo-Pacific connectivity order. In essence, Japan is the missing stabiliser in IMEC's evolving architecture. If realised

effectively, Japan's participation could turn IMEC from an aspirational concept into a model of multilateral cooperation, reflecting a convergence of Asian pragmatism and European institutional discipline. By reintroducing a Global South development orientation, supporting a diversified Mediterranean routing that reduces geopolitical risk, contributing unparalleled capacity-building and institutional harmonisation tools, and complementing US strategic objectives with

Japan is the missing stabiliser in IMEC's evolving architecture

implementable development expertise, Japan can turn IMEC into a viable, resilient, and inclusive connectivity framework.

5. FROM STRATEGIC TO TRANSACTIONAL CONNECTIVITY – GREAT-POWER COMPETITION MEETS AMERICA FIRST

Ville Sinkkonen

Donald Trump's second presidency has brought about a change in how the United States engages with the outside world, whether in terms of alliance management, summit diplomacy, trade and economic relations, or development policy. While some of the changes were already in the works during Trump's first term, others have been – if not surprising – then at least implemented at a dizzying pace.

Albeit primarily domestically facing, the administration's drive to dismantle the administrative (or 'deep') state has also had implications for US global engagement and connectivity. The shuttering of the USAID and cuts to the State Department appear particularly jarring.¹¹⁸ More broadly, espousing such an America First agenda – popular among Trump's Make America Great Again (MAGA) faithful – also means that the US is increasingly halting the diffusion of people and goods into the country by tightening immigration policies and setting up new tariff barriers from which allies and partners have not been spared.

At the same time, however, there are still many in Trump's orbit who argue that the world has entered an era defined by 'great power' or strategic competition, with China the paramount challenger for the US – espousing a consensus of sorts that emerged in Washington, DC, over the past three administrations.¹¹⁹ In fact, many of the connectivity initiatives that the US (and the west writ large) has pursued over the past two administrations fit into the broader strategy of contesting (or even containing)

¹¹⁸Sarah S. Stroup, "[Global development in crisis: Responding to America's retreat](#)," *FIIA Briefing Paper* 420 (2025).

¹¹⁹Youssef A. Nancy, Jonathan Lemire, and Missy Ryan, "[The Pentagon's Policy Guy Is All In on China](#)," *The Atlantic*, 28 July 2025; "[Understanding How Trump Sees the World: A Conversation With Nadia Schadlow](#)," *Foreign Affairs*, 8 May 2025.

China's growing influence, especially its BRI. The same can be said of the restrictions on investment and export of key technologies, many of which were already put in place during Trump's first term.

As expected, in policy practice, the second Trump administration has taken a pronouncedly 'transactionalist' tack, especially in trade policy and mediating international conflicts, such as the wars in Ukraine and Gaza. His team is amenable to striking deals that can be framed as accruing maximum benefits to the US, or even the president himself. It also helps if the deal can be framed as congruent with the pro-energy, anti-regulation, and conservative (read 'anti-woke') America First agenda. In return, the US might be willing to offer something valuable or forgo carrying out a previously articulated threat. Gone are the days when the US was described as a 'benevolent hegemon', willing to uphold international order and refrain from extracting rents.¹²⁰

It is the practical tension between the America First impulse to sector off the US from the outside world and the lingering great power competition paradigm that looks to define the Trumpian approach to connectivity in the coming three and a half years. At times, the administration's transactional policy approach may alleviate this tension. In terms of connectivity, this may create space for

'Transactional connectivity' does not amount to a coherent strategy, let alone an approach that would make a substantial difference in alleviating the massive global infrastructure gap

initiatives and collaboration that accrue benefits beyond the United States – even if this is not their ultimate rationale. Regrettably, this 'transactional connectivity' does not amount to a coherent strategy, let alone an approach that would make a substantial difference in alleviating the massive global infrastructure gap – estimated to reach \$15 trillion by 2040.

¹²⁰Stephen G. Brooks, "[The Benevolent Hegemon: Reassessing U.S. Foreign Policy in a Unipolar World](#)," *Cambridge Review of International Affairs* 28, no. 4 (2015): 556–575.

After a short historical detour, this chapter zooms in on the prospects of existing US connectivity forays in the coming years, focusing specifically on four connectivity corridors, towards which the current Trump administration has shown some interest. It then makes suggestions as to how the EU might be able to, at best, leverage the US turn to transactional connectivity or, when need be, make up for some of the worst implications of US neglect.

5.1. RECOGNISING THE STRATEGIC CONNECTIVITY IMPERATIVE

The US has been an ODA powerhouse for decades, but its approach has traditionally centred on soft connectivity, including health, education, governance, and humanitarian assistance. Recent years have brought increased focus on hard and digital infrastructure, in no small part due to geostrategic concerns. Already during the Obama era, the US rolled out its Pivot/Rebalance to Asia, acknowledging the challenge posed by a rising China, launched a New Silk Road Plan for Afghanistan, established US–ASEAN Connect to enhance economic links to the Asia Pacific, and designed the Power Africa Plan.

The US took a more unilateral turn in the first Trump term. It left key international institutions and treaties, for instance, the Trans-Pacific Partnership trade agreement negotiated by the Obama administration, the Paris Climate Agreement, and the WHO. However, the administration did push forward with certain connectivity initiatives that fit well with the framing of the international arena in terms of great power competition.¹²¹ A strategic framing of connectivity – in keeping with the requirements of a novel great-power game impacting all domains of international life, from the military and economic to the institutional and ideational – thus took hold.¹²²

¹²¹The White House, “[National Security Strategy of the United States of America](#),” The White House, 12 December 2017.

¹²²Bart Gaens and Ville Sinkkonen, “Introduction: The Many Faces of Great-Power Competition,” in Bart Gaens and Ville Sinkkonen (ed), *Great-Power Competition and the Rising US-China Rivalry – Towards a New Normal?* FIIA Report 66 (2020): 11–31.

To proactively counter China’s growing influence in infrastructure, the Better Utilization of Investments Leading to Development (BUILD) Act sought to revamp US development financing, with the establishment of the Development Finance Corporation (DFC). It replaced the US Overseas Private Investment Corporation (OPIC), came with an increased investment cap (from \$29 to \$60 bn), and got the mandate to engage in equity investments.¹²³ Internationally, the Trump team launched the Blue Dot Network in collaboration with Australia and Japan in November 2019, a certification mechanism for “quality infrastructure projects that are environmentally and socially sustainable, resilient, open and transparent, and economically efficient” – a thinly-veiled critique of BRI projects.¹²⁴

Unsurprisingly, much of the activism in Trump’s first term centred on the Indo-Pacific, a new moniker that was mainstreamed in US policy lexicon and designed to underline the interconnectedness of the Indian and Pacific Oceans.¹²⁵ The US even adopted the Japanese framing of Free and Open Indo-Pacific, emphasising sovereignty, peaceful resolution, freedom of navigation, free, fair, and reciprocal trade, as well as connectivity.¹²⁶ The Quad, encompassing Australia, India, and Japan alongside the US, was also reinvigorated as a regular ministers-level forum with an explicit mandate to enhance not just security but also regional connectivity.

Despite President Trump’s derisive attitude towards global governance initiatives, the Biden administration’s global connectivity push did not emerge out of thin air

Therefore, despite President Trump’s derisive attitude towards global governance initiatives, the Biden administration’s global connectivity push did not emerge out of thin air. After re-engaging multilateral fora, like the

¹²³Bart Gaens and Ville Sinkkonen, “[Contentious Connectivity – the USA, Japan, and the Free and Open Indo-Pacific](#),” *East Asia* 40, no. 3 (2023): 265–291.

¹²⁴“[About Us](#)”, Blue Dot Network, n.d.

¹²⁵Rory Medcalf, *Indo-Pacific Empire: China, America and the Contest for the World’s Pivotal Region* (Manchester University Press, 2020).

¹²⁶US Department of State, “[A Free and Open Indo-Pacific: Advancing a Shared Vision](#),” US Department of State, 4 November 2019.

WHO and the Paris Climate Agreement, the administration chose the G7 as its key forum for connectivity. Building on Biden's domestic Build Back Better (BBB) agenda, the Build Back Better World (B3W) initiative was unveiled in 2021 and rebranded as the PGII in 2022. The initiative would "advance public and private investments in sustainable, inclusive, resilient and quality infrastructure" around four key pillars, namely, climate and energy security, digital connectivity, gender and equity, and global health, with robust private-sector involvement. The US committed to covering \$200 bn of the announced \$600 bn pledge.¹²⁷

Unashamedly global in orientation, the PGII has listed various priority projects under its umbrella. Illustrative are three flagship economic corridors: the Lobito Corridor, the Luzon Economic Corridor, and the Trans-Caspian Corridor, each replete with strategic rationales, such as access to minerals and semiconductors, as well as diversification of supply chains and transport routes alongside development and climate-related objectives.¹²⁸ The EU and the US launched the Trade and Technology Council, envisaged to foster transatlantic connectivity and leadership on strategic technologies. The Biden administration also, by and large, adopted the FOIP framing of the first Trump administration, with more emphasis placed on alliances and partnerships with like-minded states. Resolved to set up a "lattice-work of alliances and partnerships globally that are fit for purpose for the 21st century,"¹²⁹ Biden upgraded the Quad to a leaders-level forum, and negotiated the adoption of the Indo-Pacific Economic Framework (IPEF) with 14 regional partners, focusing on trade, supply chains, clean energy, decarbonisation, and infrastructure, as well as tax and anti-corruption.¹³⁰ In September 2023,

at the G20 summit in New Delhi, the US was also among the signatories of an MoU on constructing IMEC.¹³¹

5.2. DISRUPTIVE DEALMAKING

If Biden built on the connectivity initiatives of the first Trump administration, judging by the initial forays of the second Trump presidency, a drastic reordering is afoot. Trump started his presidency with a bang, pushing his MAGA agenda of domestic security, energy dominance, dismantling of the 'deep state', and conservative values front and centre.

If Biden built on the connectivity initiatives of the first Trump administration, a drastic reordering is afoot

A key part of Trump's pledge to 'drain the DC swamp' is the figurative chainsaw that the administration took to federal departments and agencies, spearheaded by the Department of Government Efficiency (DOGE). Targets included the State Department – so far, some 2 700 employees have left voluntarily or been laid off – and USAID, which ceased to exist on 1 July 2025. Its remaining operations were taken over by the downsized State Department.¹³² In the process, 83% of USAID funding has been slashed, and the administration has, with the acquiescence of the Republican-controlled Congress, utilised the rescission process to leave previously allocated foreign aid funds unspent. The fear in the policy community and amongst Trump's critics is that, on top of the massive human suffering created by the discontinued aid programmes, the US is ceding ground to China in the developing world and destroying the foundations of American soft power.¹³³

However, the fate of USAID is only part of the story. The Trump administration envisages a big role for the DFC under the leadership of now-confirmed CEO Ben Black, a harsh critic

¹²⁷The White House, "[Fact Sheet: President Biden and G7 Leaders Formally Launch the Partnership for Global Infrastructure and Investment](#)," The White House, 26 June 2022.

¹²⁸G7 Italia, "[Factsheet on the G7 Partnership for Global Infrastructure and Investment \(PGII\)](#)," Annex I, G7 Development Ministers' Meeting, Pescara, 22–24 October 2024.

¹²⁹Jake Sullivan, "[2021 Lowy Lecture](#)," *Lowy Institute*, 11 November 2021.

¹³⁰Erin L. Murphy, "[IPEF: Three Pillars Succeed, One Falter](#)," *Center for Strategic and International Studies*, 21 November 2023.

¹³¹See Chapter 4 in this report.

¹³²Ana Faguy, "[More than 1,000 People Laid Off at US State Department](#)," *BBC News*, 12 July 2025.

¹³³Melissa Conley Tyler and Heather Wrathall, "[Six Months Later, US Soft Power Feels Effects of USAID Cuts](#)," *The Strategist (ASPI)*, 28 July 2025.

of US development financing.¹³⁴ According to reports, the revamped DFC would have a larger investment cap (as high as \$250 bn, as opposed to the previous \$60 bn) and allow for investments in high-income countries if deemed necessary for US national security and foreign policy interests.¹³⁵ Unlike most Trump administration policies, the DFC enjoys bipartisan support in Congress and could, therefore, present a potential avenue for the US to continue investing in strategically selected connectivity projects. However, the DFC's authorisation to operate, originally established during Trump's first term, lapsed during the 43-day government shutdown, resolved on 12 November 2025.

The Development Finance Corporation enjoys bipartisan support in Congress and could present an avenue for the US to continue investing in strategically selected connectivity projects

This time around, the president has not been content to announce US withdrawal from key institutions like the Paris Climate Agreement and the WHO or pressure allies for more equitable burden sharing. Instead, Trump has been in a dealmaking mode, pushing for peace in Ukraine, terrifying Europeans with his apparent willingness to hear out Russia's grievances in the process, as well as in Gaza, Nagorno Karabakh, and the Great Lakes Region of Africa. Ever the disruptor, Trump also undertook an unprecedented tariff gambit by announcing largely arbitrary 'Liberation Day' tariffs on 2 April, justified on various grounds ranging from national security to reducing the trade deficit and returning manufacturing to the US.¹³⁶ Ultimately, the announcement was followed by time-limited tariff suspensions and trade talks that one analyst has aptly described as a "shakedown."¹³⁷

¹³⁴ Joe Lonsdale and Ben Black, "How to DOGE US Foreign Aid," *Joe Lonsdale Blog*, 10 January 2025.

¹³⁵ Adva Saldinger, "Trump Has Big Plans for DFC as Reauthorization Deadline Looms," *Devex*, 29 July 2025.

¹³⁶ Jennifer Clark, "What tariffs has Trump announced and why?," *BBC News*, 5 November 2025.

¹³⁷ Ivo Daalder, "Donald Trump, the Shakedown President," *Politico*, 14 October 2025.

Under duress, US trading partners – including the EU, Japan, and South Korea – have since negotiated new deals with Washington. In return for reduced tariffs, under the EU-US framework agreement, the Union committed to \$600 bn in investments in and \$750 bn in energy purchases from the US. In their respective deals, Tokyo pledged \$550 bn of investments and South Korea \$350 bn.¹³⁸ Before a climbdown in mid-May, US tariffs on Chinese goods had reached 145%, and China's levies on American products had amounted to 125% – a seeming continuation of Trump's first-term resolve to push hard against China.¹³⁹ However, during Trump's Asian tour in late October, Trump and Chinese President Xi Jinping reached a truce, wherein the US agreed to reduce tariffs in return for China holding back on export controls for critical minerals, curbing the flow of fentanyl to the US, and promising more purchases of soybeans.¹⁴⁰

In terms of multilateral frameworks launched during the Biden era, specifically the IPEF, or cooperation fora like the Transatlantic Trade and Technology Council (TTC), the situation looks grim. Trump threatened to pull out of the IPEF already during his 2024 presidential campaign. A formal US exit could only occur in 2026 per the provisions of the agreement, but the likelihood of US support for the Biden-era initiative is low. The key benefits of the IPEF for regional states pertain to supply chain resilience and crisis response, so it remains to be seen whether other members find the agreement meaningful after a possible US exit.¹⁴¹ The TTC agenda, in turn, has been subsumed by the EU-US Framework Agreement, and it looks

¹³⁸ The White House, "Fact Sheet: The United States and European Union Reach Massive Trade Deal," The White House, 28 July 2025; River Akira Davis, "Japan Deals With the Price of Playing to Trump: \$550 Billion," *The New York Times*, 26 October 2025; Koh Ewe and Kathryn Armstrong, "S Korea Announces Lowering of Tariffs as Part of New US Trade Deal," *BBC News*, 29 October 2025.

¹³⁹ Liz Lee and Shi Bu, "Trump's trade war with China in 2025," *Reuters*, 11 November 2025.

¹⁴⁰ Kyle Chan, Jonathan A. Czin, Ryan Hass et al., "What Happened When Trump Met Xi?," *Brookings*, 5 November 2025.

¹⁴¹ Philip Luck and Richard Gray, "Aligning APEC Beyond Trade Turmoil," *Center for Strategic and International Studies*, 24 October 2025; Yuma Osaki, "Is this time different? IPEF and American trade leadership in the Indo-Pacific," *Indo-Pacific Insight Series* 22 (2024).

unlikely that the Trump administration would engage in the format.¹⁴²

5.3. THE TRANSACTIONAL CONNECTIVITY IMPULSE

But what does Trump's disruptive transactional approach mean for connectivity? Based on the first roughly ten months of his second term, the above-mentioned economic corridors provide concrete examples of how Trump's transactionalism could ultimately adjudicate between great-power competition and the America First agenda, creating limited and sector-specific connectivity forays in the process.

As part of the Commercial Diplomacy Strategy for Africa, built on "trade, not aid," the current administration reaffirmed the US commitment to the Lobito Corridor over the summer of 2025.¹⁴³ A 1 300-kilometre railway connecting the Democratic Republic of Congo (DRC) and Zambia to the Atlantic coast via Angola, the Corridor was originally launched at the Global Gateway Forum in 2023 with a MoU signed between the US, the European Commission, the governments of Angola, the DRC, and Zambia, as well as the Africa Finance Corporation (AFC) and the African Development Bank (AfDC). By the end of the Biden era, it had garnered some \$4 bn in pledged investment from the US and \$6 bn in total.¹⁴⁴ According to initial reports, the Trump administration is focused on bolstering the prospects of US companies and leveraging business investments through "high-impact, commercially viable projects that unlock investment."¹⁴⁵ In June, the 2025 US-Africa Business Summit produced over \$2.5 bn in investment pledges on energy, digital

infrastructure, and, specific to the Lobito Corridor, a collection of grain silo terminals.¹⁴⁶ The DFC is also finalising talks over \$550 mn in financing for the corridor, a process that began already in the Biden era.¹⁴⁷ Fears remain, however, over the impact of US funding freezes on "feasibility studies, technical services and crucial early-stage payments."¹⁴⁸

The second Trump administration has also shown interest in the Luzon economic corridor. A headline item symbolising the Indo-Pacific preoccupation of past administrations, the corridor was launched at a trilateral leaders' summit between Japan, the Philippines, and the US on 11 April 2024 as the first such PGII-based project in the Indo-Pacific. Upon completion, it would enhance the connections of Subic Bay, Clark, Manila, and Batangas in the Philippines, encompassing, for instance, rail, ports, clean energy, semiconductors, and agribusiness.¹⁴⁹ The first three projects announced under its rubric – i.e., the \$868 mn Subic-Clark railway, a \$174 mn second runway at Clark International Airport, and the \$152 mn Clark National Food Hub – already amount to over \$1 bn.¹⁵⁰ Against this backdrop, the Trump commitment is tiny, a paltry \$15 mn investment targeted at "transport, logistics, energy, and semiconductors" as part of a broader \$60 mn package for the Philippines.¹⁵¹ However, it was the first new foreign assistance pledge by the Trump administration since the aid freeze it announced in January, and continued engagement speaks to the value the US places on its relationship with the Philippines, regardless of who sits in the Oval Office.¹⁵²

¹⁴²Aleksandra Wójtowicz, "Trade and Technology Council's Future in Question under Trump," *PISM Bulletin* 27 (2528), 6 March 2025.

¹⁴³Troy Fitrell, "Remarks for Launch of Bureau of African Affairs Commercial Diplomacy Strategy," US Department of State, 14 May 2025; Miguel Gomes and Colleen Goko, "US Envoy Plays Down Africa Tariff, Visa Concerns, Reaffirms Lobito Rail Commitment," *Reuters*, 24 June 2025.

¹⁴⁴Sarah Way, "What to Know about the Lobito Corridor – and How It May Change How Minerals Move," *Atlantic Council*, 20 December 2024.

¹⁴⁵John Eligon, "Angola Rail Line Offers Clues to Trump's Africa Policy," *The New York Times*, 2 April 2025; Tom O'Connor, "Donald Trump's Big Deal with Africa and China," *Newsweek*, 20 October 2025; Troy Fitrell, "Remarks for the Opening of the 17th Corporate Council on Africa U.S.-Africa Business Summit," US Department of State, 23 June 2025.

¹⁴⁶US Department of State, "Fact Sheet: Record-Breaking U.S.-Africa Business Summit Yields \$2.5 Billion in Deals and Commitments," US Department of State, 30 June 2025.

¹⁴⁷"\$500m US Backing for Lobito Railway," *Africa Briefing*, 26 June 2025.

¹⁴⁸E. D. Wala Chabala and Judy Hofmeyr, "A game changer in flux: recent developments and risks in the Lobito corridor," *Africa Policy Research Institute*, 5 May 2025.

¹⁴⁹The White House, "Joint Vision Statement from the Leaders of Japan, the Philippines, and the United States," The White House, 11 April 2024.

¹⁵⁰Kevin Chen, "The Luzon Economic Corridor: A Badly Needed Win for the US in Southeast Asia," *The Diplomat*, 20 May 2024.

¹⁵¹US Embassy in the Philippines, "U.S. Announces Php3 Billion in Foreign Assistance for the Philippines," US Embassy in the Philippines, 23 July 2025.

¹⁵²Japhet Quitzon, "The Uniquely Stable U.S.-Philippines Partnership," *Center for Strategic and International Studies* (CSIS), 4 September 2025.

Brokering a peace deal between Armenia and Azerbaijan has led the Trump administration to take a tangential interest in the Trans-Caspian Transport Corridor (TCTC), also called the Trans-Caspian International Trade Route (TITR) or the Middle Corridor, which ties Europe to Asian markets through Central Asia and the Caspian Sea. The development of the route has become more urgent in the face of Russia's war of aggression against Ukraine, and the EU has been spearheading the push. The Union allocated \$10 bn in public and private funding pledges for the development of the corridor, unveiled in January 2024.¹⁵³ The most high-profile manifestation of US engagement in the Caucasus during the Biden presidency was the inaugural C5+1 Summit between the Presidents of the United States, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan.¹⁵⁴ The US also launched a Trans-Caspian Trade Route Action Plan and Coordination Platform.¹⁵⁵ The Trump administration, in turn, has proposed a 99-year American mandate to oversee a transport corridor – the Trump Route for International Peace and Prosperity (TRIPP) – that would link Azerbaijan and its Nakhichevan enclave through Armenian land (the Zangezur Corridor). This multimodal route would thus connect Azerbaijan and Türkiye, reduce transit distance, and contribute to the needs of the TCTC in the process.¹⁵⁶ The US has so far pledged \$145 mn for the project, whose estimated \$3 to \$5 bn infrastructure costs over 5 to 10 years could be offset by its potential \$20 to \$30 bn in transport savings.¹⁵⁷

With respect to IMEC – the grand connectivity project linking India and Europe via the UAE,

Saudi Arabia, Israel, and Italy and Greece – the Trump administration voiced support when the President met India's Prime Minister Narendra Modi in February. The readout of the meeting also linked the corridor to further discussions within the I2U2 group (India, Israel, the UAE, and the US).¹⁵⁸ However, while the Trump-brokered ceasefire between Israel and Hamas in October could be seen as a first step in removing a key obstacle for IMEC, the US-India bilateral relationship has deteriorated significantly in recent months. The Trump administration has targeted India with 50% tariffs and secondary sanctions for its purchases of Russian oil – reportedly in reaction to Modi's recalcitrance over India's tariff rates on American goods and his unwillingness to give Trump credit for brokering the recent ceasefire between India and Pakistan.¹⁵⁹ At present, it is unclear when and how the tensions between the US and India will be resolved, leaving open questions regarding the US's role in IMEC's future.

The Trump approach to economic corridors illustrates that the underlying geopolitical logic behind US connectivity pursuits remains intact

5.4. TRANSACTIONAL CONNECTIVITY IN PRACTICE – SQUARING THE COMPETITIVE CIRCLE

The Trump administration is not particularly concerned with the sustainability, climate, and good governance concerns that President Biden used to justify his connectivity agenda. However, the Trump approach to economic corridors illustrates that the underlying geopolitical logic behind US connectivity pursuits remains intact. The projects are ultimately geared towards countering China's influence in the respective regions, whether

¹⁵³ European Commission, "[Global Gateway: €10 Billion Commitment to Invest in Trans-Caspian Transport Corridor Connecting Europe and Central Asia](#)," European Commission Press release IP/24/501, 24 January 2024.

¹⁵⁴ The White House, "[C5+1 Leaders' Joint Statement](#)," The White House, 21 September 2023.

¹⁵⁵ US Department of Commerce, "[Trans-Caspian Trade Route \(TCTR\)](#)," US Department of Commerce, n.d.

¹⁵⁶ Emil Avdaliani, "[Trump's Road TRIPP Delivers a Peace Deal](#)," *Center for European Policy Analysis*, 13 August 2025.

¹⁵⁷ "[US to Set Up Working Groups with Armenia, Azerbaijan to Work on TRIPP Details – Report](#)," *Eurasianet*, 29 October 2025; Yıldız, Güney, "[America's High-Stakes Bet on Zangezur: How a U.S.-Led Corridor Could Slash Europe's Energy Costs and Counter Russia](#)," *Forbes*, 18 July 2025.

¹⁵⁸ "[CNN Newsroom: Trump and Modi Meets at White House; Firing at Federal Agencies Underway; Trump Announces Plan for Reciprocal Tariffs](#)," *CNN Newsroom*, Aired 13 February 2025; Ministry of External Affairs of the Government of India, "[India-U.S. Joint Statement \(February 13, 2025\)](#)," Ministry of External Affairs of the Government of India, 13 February 2025.

¹⁵⁹ Isaac Chotiner, "[The Stunning Reversal in U.S.-India Relations](#)," *The New Yorker*, 30 September 2025.

by diversifying transport routes, bringing in western investments as alternatives to those channelled through the BRI, or strengthening supply chain resilience.¹⁶⁰ The IMEC and TCTC/TRIPP also have the added benefit of complicating the regional calculi of Russia and Iran. Perhaps most relevant of all, these initiatives address central themes in Trump's second-term agenda.

First, the Lobito and Trans-Caspian corridors are designed to improve US access to rare earths and critical minerals – a central preoccupation for the current administration, as evinced by the signing of the minerals deal with Ukraine and Trump's incessant fixation with Greenland, in part, for its natural resources.¹⁶¹ By imposing export restrictions in October, China illustrated that its control of the global rare earths market – 61% of production and 92% of processing, according to estimates – would allow Beijing to seriously hinder the American defence industry and derail the domestic manufacturing boom that Trump wants to achieve as part of his MAGA agenda.¹⁶² In this respect, the one-year truce that Xi and Trump achieved at their bilateral meeting over tariffs and rare earth export restrictions only kicks the proverbial football down the road. The US, not to mention its allies and partners in the Indo-Pacific and Europe, has a strong imperative to diversify supplies, and to do so at breakneck speed.

Second, the Luzon Corridor and IMEC fit the administration's push for technological supremacy, to which the personal interests of Trump and his family businesses are also increasingly intertwined. In the Indo-Pacific, the Luzon Corridor would increase the resilience of the semiconductor supply chain that

critical technologies draw upon.¹⁶³ Trump's May 2025 Middle East tour produced over \$2 tn in announced deals ranging from data centres to ports and military hardware, and in this context, IMEC has – according to one analysis – become embedded in the creation of an "AI-powered world order that fuses American AI ambition with Gulf energy, land, and cash."¹⁶⁴ This augurs the potential for considerable private-sector buy-in and boons for Trump and his backers in the tech industry.

Third, the corridors could provide the administration with sizable returns for relatively small investments. In the case of IMEC, for instance, the bulk of the money is expected to come from the Gulf states and India, while Europe also has a significant interest in investing in the success of IMEC as well as the Trans-Caspian and Lobito Corridors.¹⁶⁵ Moreover, the corridors present precisely the kinds of projects that a repurposed DFC could be expected to target, ultimately allowing the US government to offload more responsibility to the private sector.

Finally, the success of the corridors is intimately linked to Trump's spectacle-based mediation diplomacy, which the president clearly sees as validating his personal legacy and as the ultimate proof that his transactional brand of foreign policy is working. This is the case for the Lobito Corridor and the peace agreement between the DRC and Rwanda, IMEC and the Israel-Hamas ceasefire, and the Trans-Caspian Corridor and the peace deal between Armenia and Azerbaijan.

What is missing from Trump's 'transactionalist' approach is any long-term plan

What is missing from Trump's 'transactionalist' approach is any long-term plan tying these corridors to a broader (strategic) connectivity vision, let alone a conception of international order that would accrue long-term benefits for

¹⁶⁰Kristina Kausch, "IMEC's Comeback," *German Marshall Fund of the United States (GMF)*, 11 April 2025; Alberto Frigerio, "CS+1 Summit: What's at Stake for the US and Central Asia?" *The Diplomat*, 31 October 2025; Maria Adele Carrai, "The Belt and Road Initiative and Emerging US-China Rivalries in Africa: The Case of the Lobito Corridor," *Global Policy* 16 (4) (2025): 739–750; Japhet Quitzon, "The Uniquely Stable U.S.-Philippines Partnership," *Center for Strategic and International Studies (CSIS)*, 4 September 2025.

¹⁶¹Christina Lu, "Trump's Chaotic Agenda Has a Critical Through Line," *Foreign Policy*, 26 February 2025.

¹⁶²Ayeshea Perera, "Why the US Needs China's Rare Earths," *BBC News*, 16 October 2025.

¹⁶³Narupat Rattanakit, "Economic Corridors: One Way Forward for US Engagement in Southeast Asia," *The Diplomat*, 10 February 2025.

¹⁶⁴Guy Laron, "Trump's Road to Riyadh: The Geopolitics of AI and Energy Infrastructure," *American Affairs Journal* Vol. 64, No. 3 (2025).

¹⁶⁵Saad Bin Mushtaq, "IMEC Corridor: Strategic Realignment to Counterbalance China," *Meer*, 8 October 2025.

all concerned. Instead, Trump remains stuck somewhere between a traditional extractive great-power role without a higher purpose and his drive to put America – or more insidiously, the president, his extended family, and key backers – first.¹⁶⁶

5.5. IMPLICATIONS FOR EUROPE

The Trumpian turn to transactional connectivity presents the EU with both opportunities and challenges. Before the EU began its geopolitical shift in the mid-2010s, it was often called a normative power, an actor seeking to entrench good governance standards and human rights, contribute to sustainable development, and empower local actors.¹⁶⁷ The Global Gateway – the EU’s grand connectivity framework announced in 2021 – has been criticised for prioritising geopolitics and the interests of European companies over development.¹⁶⁸ The US exit from certain aspects of the connectivity game, especially in climate, sustainability, and people-to-people connectivity, creates the imperative and opportunity for the EU to do more on these questions, potentially recapturing some of its *sui generis* international role in the process.

The Trumpian disruption also incentivises the EU to cultivate other partnerships

The Trumpian disruption also incentivises the EU to cultivate other partnerships. The Union has already started this by, for instance, trying to push the EU-Mercosur agreement across

the finish line and signing a political agreement with Indonesia. In the connectivity sphere, the EU already has partnerships in place with Japan and India, digital partnerships with Japan, Canada, Singapore, and South Korea,¹⁶⁹ and the EU-LAC Digital Alliance and the EU-ASEAN Sustainable Connectivity Package (SCOPE).¹⁷⁰ The challenge at present is finding ways to harness these frameworks to deliver on their objectives. For instance, the EU-Japan and EU-India partnerships have yet to deliver much, especially when it comes to connectivity cooperation in third countries.¹⁷¹

At the same time, US and EU interests continue to overlap in key domains. Generally speaking, peace and stability in Europe’s near abroad remain in EU interests, even if the way Trump is going about achieving peace, through transactional mediation, is unusual, while his support for Ukraine is tenuous at best. The economic corridors factor heavily in this deals-based diplomacy. Moreover, if the EU hopes to achieve any semblance of strategic autonomy from other global powers – whether the US, China, or Russia – it must continue diversifying its energy supplies and acquiring rare-earth. This creates potential, if not for cooperation, then at least coordination with Trump’s US on specific economic corridors. To illustrate, the EU, through its Team Europe model, has already catalysed over €2 bn in investments in the Lobito Corridor.¹⁷² The Union, being deeply invested in the TCTC, also appears amenable to supporting Trump’s TRIPP pet project in the Caucasus.¹⁷³ EU member states, including

¹⁶⁶ Barry Posen, “[The Rise of Illiberal Hegemony](#),” *Foreign Affairs*, 13 February 2018; Ville Sinkkonen, “The United States and Lost Visions of International Order in a World of Great-Power Competition,” 2026 (forthcoming).

¹⁶⁷ Niklas Helwig, Marco Siddi, and Ville Sinkkonen, “The European Union’s Evolving Vision for the International Order: From Liberal Beacon to Competitive Pole,” in Ville Sinkkonen, Matti Puranen, and Veera Laine (ed) *Competing Visions for International Order: Challenges for a Shared Direction in an Age of Global Contestation* (Routledge); Ian Manners, “[Normative Power Europe: A Contradiction in Terms?](#),” *JCMS: Journal of Common Market Studies* 40, no. 2 (2002): 235-258.

¹⁶⁸ Alexandra Gerasimcikova and Farwa Sial, “[Who profits from the Global Gateway? The EU’s new strategy for development cooperation](#),” European Network on Debt and Development, October 2024; David Skidmore, “[US Foreign Aid With Chinese Characteristics](#),” *The Diplomat*, 24 July 2025; Tyyne Karjalainen, “[European Norms Trap? EU Connectivity Policies and the Case of the Global Gateway](#),” *East Asia* 40 (2023): 293–316.

¹⁶⁹ European Commission, “[Digital partnerships](#),” European Commission, n.d.; Ministry of External Affairs of the Government of India, “[India-EU Connectivity Partnership](#),” Ministry of External Affairs of the Government of India, 8 May 2021; European External Actions Service, “[The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan](#),” European External Actions Service, 27 September 2019.

¹⁷⁰ European Commission, “[EU-Latin America and Caribbean Digital Alliance](#),” European Commission, n.d.; European External Action Service, “[The European Union and ASEAN](#),” European External Action Service, n.d.

¹⁷¹ See Chapter 3 in this report.

¹⁷² European Commission, “[EU-Angola Partnership Advanced through Major Investments in Lobito Corridor](#),” European Commission (Global Gateway Forum), 9 October 2025.

¹⁷³ “[EU Reaffirms Readiness to Support TRIPP and Crossroads of Peace Initiatives as Armenia, US Continue Peace Dialogue](#),” *Caucasus Watch*, 21 October 2025.

France, Italy, and Greece, are also angling for a position as IMEC's entry point into Europe. Proponents of the initiative argue that it could become a defining project, tying together the Global Gateway and the EU's free trade negotiations with India.¹⁷⁴

Of course, the new Trumpian approach to connectivity also presents the EU with considerable risks. The EU-US framework agreement not only keeps a 15% tariff on European exports to the US in place but is also symptomatic of the broader unravelling of the world trading system – bad news for Europe's trade-reliant and slowly growing economies. It is also a very one-sided bargain, and implementation is still in its infancy. For instance, the provisions of the framework call for “address[ing] unjustified digital barriers,” but, as mentioned, the Trump administration has so far been unwilling to engage on the EU-US TTC.¹⁷⁵

Elsewhere, the US is also pushing the Europeans for drastic increases in defence spending, all of which leaves EU member states that are also NATO Allies in a bind when it comes to spending priorities.¹⁷⁶ This risks a race to the bottom – namely, further decreases in already plummeting development funding in the west writ large.¹⁷⁷ Most troubling of all, the current US administration views the EU as an extension of the domestic enemy: a liberal-internationalist elite-driven project beholden to ‘woke’ ideologies. This renders cooperation more difficult across the board. In this setting, bilateral transactions-based diplomacy driven by the member states may be a better way of engaging with the Trump administration on connectivity than trying to engage with the administration directly, increasing the challenge for the EU to remain united.

¹⁷⁴Rachel Rizzo and Nicholas Shafer, “[It Is Europe’s Time to Shine on IMEC](#),” *New Atlanticist Blog*, 29 May 2025; Kaush Arha and Giulio Terzi, “[IMEC Is Still Europe’s Ticket to Asia and Africa](#),” *The National Interest*, 19 September 2025.

¹⁷⁵European Commission, “[Joint Statement on a United States-European Union framework on an agreement on reciprocal, fair and balanced trade](#),” European Commission, 21 August 2025.

¹⁷⁶Kristina Kausch, “[IMEC’s Comeback](#),” *German Marshall Fund of the United States (GMF)*, 11 April 2025.

¹⁷⁷Sarah S. Stroup, “[Global development in crisis: Responding to America’s retreat](#),” *FIIA Briefing Paper* 420 (2025); Emma Pirnay, “[Exclusive: EU Mulls Copying US with End to Aid for Global Health Funds](#),” *Euractiv*, 27 October 2025.

5.6. CONCLUSION

This chapter has sought to foreground the second Trump administration's approach to connectivity by looking at the recent history of US connectivity initiatives. It illustrates that the current administration is a moving target and difficult to predict. On the one hand, this is a function of the President's famously mercurial nature and mixing of his personal interests with carrying out the duties of the office. On the other hand, the tension between the America First and great-power competition mindsets within the administration means that competing frames of reference pull US policy in potentially contradictory directions. However, this in-built strain can sometimes be resolved by the president's pronouncedly transactional policy approach. This transactionalism – a central component of the administration's connectivity policies – presents some opportunities, but also difficult-to-navigate challenges for America's traditional partners and allies, including the EU and its member states.

RECOMMENDATIONS AND THE WAY FORWARD

As of the 2010s, infrastructure development and connectivity in all its forms have turned into key elements of global geopolitical competition. Connectivity should, therefore, be considered not as a stand-alone entity but rather as entailing complex, multi-layered, and dynamic interlinkages with strategic potential. Following the inauguration of the BRI in 2014, a range of global actors, including Japan, the US, the EU, and India, have rolled out competing strategies and initiatives. As noted in the chapter by Bart Gaens and Prannavan Surendran, for some, this underscores the emergence of connectivity wars, where infrastructure, institutions, and norms are weaponised, and connectivity functions as a decisive arena of geopolitical competition, linking development, security, and normative power. The main focus of this report was on how Japan, as a major actor, has applied strategic connectivity as a geopolitical tool, aligning ODA, economic cooperation, security considerations, foreign policy, and national interest under the banner of FOIP.

Southeast Asia is a prime focal region for Japan's strategic connectivity policy. As Wrenn Yennie Lindgren contends, the Philippines can be seen as a case study of infrastructure development to achieve economic growth, but also of how OSA is employed to reinforce security capabilities and deterrence. This clearly attests to the increasing importance of defence connectivity in Japan's broader engagement in the region. The case of the Philippines illustrates how Japan integrates physical, institutional, and people-to-people connectivity into a broader geopolitical strategy. Questions remain, however, about the impact and reception of these policies, underscoring the need for further research.

As another tool to implement strategic connectivity policy, Japan has sought to cooperate with so-called like-minded partners. With India, initiatives like the AAGC and more recent Africa-focused cooperation have struggled with implementation, though new frameworks on economic security and supply chains suggest renewed momentum. With the EU, the Partnership on Sustainable Connectivity and Quality Infrastructure (2019) has produced few tangible joint projects, often limited to the rebranding of existing efforts, as bureaucratic fragmentation, national branding, and weak private-sector incentives hinder progress. As Bart Gaens argues in his chapter, while these partnerships succeed diplomatically in signalling alignment, their practical impact remains limited, while revealing a shift toward more narrowly defined areas of cooperation such as digital affairs, competitiveness, and, in particular, defence and security.

IMEC presents an important economic corridor connecting Asia, the Middle East, and Europe. Initially driven by the US under the Biden administration, it offers a potential reconfiguration of commercial and energy flows and could provide a valuable alternative to China's connectivity dominance. However, in view of the volatility of the region as well as US retrenchment under President Trump, the initiative has not taken off. Jagannath Panda argues that Japan, with its reputation for quality infrastructure, transparent financing, and balanced diplomacy, is uniquely positioned to stabilise IMEC and provide the governance, regulatory

harmonisation, and soft infrastructure the corridor currently lacks. Tokyo's experience in customs facilitation, digital governance, and capacity building could transform IMEC from a logistics corridor into a sustainable connectivity framework. Ultimately, Japan's participation would not only enhance IMEC's credibility and resilience but also embed it within the broader Indo-Pacific narrative of free, open, and rules-based connectivity.

Indeed, one major obstacle to western efforts to compete with China in terms of infrastructure development has been the mercurial politics of disconnectivity by the US, Japan's security ally. As argued by Ville Sinkkonen, while earlier administrations emphasised connectivity as a strategic tool, Trump's current approach prioritises short-term deals that maximise US gains, often at the expense of a coherent long-term strategy. Case studies such as the Lobito Corridor in Africa, the Luzon Economic Corridor in the Philippines, and the Trans-Caspian Transport Corridor in Central Asia reveal that US involvement is framed through transactional pledges, tariff negotiations, or peace-brokering rather than sustained investment. The result is limited, sector-specific engagement that underscores US retreat from benevolent hegemony, raising questions about whether allies, such as the EU, can leverage or compensate for America's transactional turn in global connectivity.

Limited, sector-specific engagement underscores US retreat from benevolent hegemony, raising questions about whether allies can leverage or compensate for America's transactional turn

Taken together, the chapters in this report attest that global infrastructure and connectivity have become central arenas of geopolitical competition. The Japan-India and Japan-EU partnerships, as well as IMEC, demonstrate significant diplomatic alignment. However, they also show the implementation difficulties of large-scale, collaborative initiatives that aim to counterbalance China's dominance. Challenges include regional geopolitical instabilities, America's transactional approach, and implementation

difficulties, such as competition over national brands and bureaucratic fragmentation. On the other hand, the cases discussed in this report all point to a growing emphasis on the areas of economic security, competitiveness, and military security and defence cooperation.

In this light, and drawing on the case of Japan's connectivity endeavours, this report offers the following policy recommendations, in particular, for the European Union:

Recommendations for the EU's global connectivity agenda

- **Cooperate pragmatically with the US:** The transactional approach to connectivity pursued by the US creates spaces where EU and US interests converge. Here, the Union should be open to collaboration and pragmatic about what promotes vital objectives for Europe, including diversification of energy supplies and access to critical minerals and raw materials.
- **Cooperate with other major actors:** Europe, as well as Japan, needs to be clear-eyed about the limits of collaboration with the US. This means building on existing frameworks of cooperation (including EU-Japan and Japan-India) and creating novel ones with other like-minded partners and allies. For example, Japanese participation in IMEC would triangulate cooperation between Japan, India, and the EU. The second presidency of Donald Trump has generated a heightened sense of urgency for cooperation between global actors. This urgency is particularly evident in domains such as economic security, green energy and advanced technologies, global health and development, and defence. In each of these spheres, the volatility of US policy reinforces the need to deepen collaboration, pool resources, and strengthen resilience against external shocks. The EU is still the largest provider of international aid in the world and a trustworthy partner for many countries, opening up opportunities for cooperation on specific issues.
- **Reassess the EU approach:** The EU should use the disruption created by the Trump administration as an opportunity to critically reassess its own connectivity

policies, including the Global Gateway. This includes asking difficult questions about how the Union's current policy framework contributes to addressing the needs of recipient countries and the imperative of sustainable development – an opportunity to 'reclaim connectivity' in an uncertain age. Furthermore, given the critical stance of the Trump administration towards the EU and its institutions, member states should coordinate amongst themselves on how to engage in bilateral diplomacy with the US in a manner that benefits Europe writ large – the European approach to dealing with Trump on Ukraine questions could serve as a possible future template.

Recommendations for cooperation with like-minded actors

- **Utilise comparative advantage:** Geopolitics remains a central driver of connectivity partnerships at the political and diplomatic level. Yet, what ultimately matters on the ground is comparative advantage, achieved through a focus on quality, sustainability, standards, and inclusivity – with the involvement of civil society actors. To translate political commitments into tangible outcomes, there is a pressing need for carefully selected flagship projects that visibly embody these quality norms and serve as demonstrative models of best practice. Collaborative efforts involving Japan should, therefore, not be framed in terms of strategic competition with China, but rather as constructive efforts to promote an open, inclusive, and rule-based connectivity order. Following Japan's 'realism diplomacy', an overly assertive imposition of values on partners in the global south should be avoided.
- **Leverage divisions of labour:** Triangular connectivity partnerships tend to be more effective when they are structured asymmetrically, as is often the case in development aid. The Japan-India Cooperation Initiative for Sustainable Economic Development in Africa, therefore, holds greater potential than the Japan-EU partnership, as its asymmetrical design allows Japan to take the driving seat while leveraging India's regional presence and networks. Successful joint initiatives are

thus more likely to emerge when responsibilities are clearly differentiated, with one actor providing strategic leadership and others reinforcing the effort through targeted contributions. A division of labour based on comparative advantages – whether in terms of location, expertise, experience, or existing networks – offers a more workable model than co-financing, both from the perspective of funding countries and third-country recipients, as well as private-sector actors. In the case of EU–Japan cooperation, the West Africa Growth Ring and the Northern Corridor exemplify large-scale corridor development projects where the two partners share complementary interests.

- **Learn from Japan’s multi-layered approach:** Connectivity initiatives should not be seen as stand-alone entities but rather as complex and dynamic interlinkages with a strong strategic dimension. The case of Japan reveals its unique strengths in areas such as synchronising standards, improving customs harmonisation, and institutionalising transparency in procurement. For example, IMEC is a good example of an initiative in which Japan could usefully apply its expertise in customs facilitation, border management, and regulatory harmonisation. It is, therefore, important to take a comprehensive approach that includes both structural and non-structural, as well as hard and soft dimensions of infrastructure development.
- **Mobilise the private sector:** In the field of infrastructure, connectivity partnerships must be actively promoted within the private sector. Private investment is indispensable for implementation, yet investors often remain reluctant due to unpredictable political, regulatory, and economic risks,

despite the existence of risk-mitigating policies. Existing platforms could serve as valuable fora for business matchmaking. For example, the Tokyo International Conference on African Development (TICAD) – as a key multilateral forum – could be leveraged to involve European companies, including small and medium-sized enterprises, in sectors such as Africa’s digital economy. Similarly, India’s Act East Forum offers opportunities for bringing Indian and Japanese companies together to advance private-sector-led business and investment in Africa.

Recommendations for further research

- **Bridge policymaking and academic study:** Since our knowledge about connectivity and its potential is dynamic and constantly evolving, it is essential to support further research, expand knowledge, and move beyond *ad hoc* analysis toward sustained, focused deliberations with academics and policymakers on the shifting contours of connectivity and their broader implications.
- **Emphasise the recipient perspective in connectivity initiatives:** Connectivity is a relational process that often involves multiple parties. It is important to consider the needs and agency of recipient states, not just donor strategies.
- **Further research on more narrowly defined forms of connectivity:** In view of the ongoing shift in policymaking circles from Connectivity (with a capital ‘C’) to connectivity, further research is required on focused collaborative projects across distinct spheres. These could include not only hard infrastructure, but also economic security, knowledge and digital infrastructure, as well as defence and security domains.

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