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Citizen perceptions of the EU's Global Gateway and China's Belt and Road Initiative: evidence from South Africa and Nigeria

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ABSTRACT
Western donors have responded to competition from Chinese development finance by introducing infrastructure initiatives of their own. Are they effective in helping donors curry favour in recipient countries? We focus on the European Union's (EU) Global Gateway Initiative, commonly understood as a response to China's Belt and Road Initiative. In survey experiments fielded in South Africa and Nigeria, we investigate how respondents in recipient countries perceive EU- and Chinese-funded projects. Compared to China, we find that the EU gains more reputational benefits from funding projects. Overall, however, respondents do not discriminate between China and the EU as funders of hypothetical development projects. This suggests that the Global Gateway has the potential to compete with China for soft power influence, if consistent branding and identification of the EU can overcome current lack of familiarity with the EU.

KEYWORDS
European Union; Global Gateway; China; development aid; development finance; Africa; public opinion

1. Introduction

Countries provide foreign aid and development finance for many reasons. It can be a means of supporting economic stability in strategically important countries (Bermeo 2017), cementing diplomatic relationships, and generating trade and investment benefits for domestic firms and development finance institutions (Bau, Dietrich, Qian, and Trinh 2026; Brazys 2025). It can also be used to garner support in international organisations (Anyiam-Osigwe and Vreeland 2026; Dreher, Nunnenkamp, and Thiele 2008; Vreeland and Dreher 2014). For many donors, even if development projects are designed primarily for development effectiveness, development finance is part of a broader soft power strategy to enhance the donor's reputation in recipient countries (Blair, Marty, and Roessler 2022; Constantelos, Diven, and Kilburn 2023; Gafuri 2024; Goldsmith, Horiuchi, and Wood 2014).

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The Global Gateway (GG), launched by the European Union (EU) in 2021, exemplifies the varied motivations that underpin development finance initiatives. As the introduction of this special issue explains, the GG is a 'strategic pivot' for the EU, deploying development finance to achieve geopolitical aims in a context of great power competition. In response to China's development finance approach, the GG is also intended to generate commercial benefits for European firms, heralding a shift to a more transactional development policy (Bau and Dietrich 2026). Finally, there is an (implicit) expectation that a more transactional repackaging of development finance will allow the EU to exercise greater foreign policy influence in recipient countries, prompted by disappointment in some European capitals that developing countries, despite extensive EU and member state aid, align more closely with China and Russia in international organisations, including after Russia's 2022 invasion of Ukraine.

In this paper, we contribute to this special issue's focus on the GG's function in great power competition by investigating how the *public* in recipient countries appraises the EU as a development finance provider. Specifically, we address the question 'How does the Global Gateway affect the EU's role in the dynamics of great power competition?' by examining the responses to EU development finance in countries receiving this finance. We consider recipient country perspectives through an analysis of public opinion. We use an original survey experiment fielded in South Africa and Nigeria to investigate whether learning that an infrastructure project is funded by the EU or China changes respondents' attitudes toward each donor and the project itself. As such, we are able to test whether funding highly visible projects can help to enhance the EU's reputation in recipient countries, generating public support that can enable greater policy influence. This provides empirical evidence of the GG's likely impact on public opinion, given that many of the actual GG projects are still nascent.

Existing survey evidence indicates that citizens across many African countries hold positive views of China and may have less positive views of the EU. In the most recent round of Afrobarometer, fielded in 39 countries between 2021 and 2023, 50.8% of respondents say that China has a 'very' or 'somewhat' positive "economic and political influence on their country.[1] By contrast, only 38.5% of respondents had a positive view of EU influence.[2] Notably, 27.2% of respondents responded 'Don't know/Haven't heard enough' when asked about the EU's influence. With only 19.6% doing so for China, the EU seems to have less name recognition and less of a positive association than China among the African public.[3]

We design a survey experiment to systematically investigate whether financing a development project generates a reputation boost for the EU and how this compares for China. We present respondents with a vignette about a hypothetical infrastructure project in the electricity sector, varying whether this project is attributed to an unnamed donor, the EU, or China. We are then able to test whether respondents have a more favourable view of the EU if they have been told about an EU-financed project, compared to China or an unnamed donor, and whether respondents have a more positive view of the specific project if they are told that it is funded by the EU or China.

We field this survey experiment in South Africa and Nigeria, two middle-income countries that are representative of recipients targeted for GG projects, compared to the social sector focus of grant aid targeted to low-income countries. Our analysis is based on a sample of 1,571 responses in Nigeria and 2,011 responses in South Africa. The online surveys were distributed by local survey companies – Lagos Green Transport in Nigeria and Pure Spectrum in South Africa – and nationally representative by gender and age. Since respondents needed an internet-connected device to complete the survey, the samples are more urban and educated than the population as a whole. While we exercise some caution about extrapolating the findings to the general public, we suggest that we can generate meaningful insights from these surveys – even if they are not fully nationally representative – about how EU infrastructure finance is likely to impact EU soft power. To the extent that public opinion matters for foreign policy, including whether to accept foreign finance for infrastructure projects, the opinion of more educated and urban citizens is likely to hold greater sway.

Our findings reveal that the identity of the donor does have an effect on respondents' attitudes toward the donor. We find that the EU gains a significant reputational benefit from being identified as the funder of the project, one that is larger than the reputational boost for China. This is mostly because China already enjoys a positive reputation among respondents and therefore does not see much of an increase in response to the hypothetical project. However, when it comes to attitudes toward the project, respondents largely do not strongly distinguish between China and the EU as project funders. On balance, this suggests that the EU does not face a strategic disadvantage compared to China in using its development finance to win hearts and minds.

Our paper contributes to this special issue's focus on the GG's utility as a tool of great power competition. Citizens do respond to news of an EU-funded infrastructure project with a more positive assessment of the EU, highlighting the potential for the GG to enhance public perceptions of the EU, increasing the EU's soft power reach. Of course, decisions over development finance are ultimately the preserve of elite politics, and the public in African states has little direct influence over their government's relations with the EU. Nevertheless, if the GG's aspiration is to enhance the EU's global standing, then improving public perceptions of the EU will be an important aspect of this policy.

Beyond the GG, our paper adds to a growing literature on public opinion of aid in recipient countries (Blair, Marty, and Roessler 2022; Clark, Dolan, and Zeitz 2025; Hirose, Montinola, Winters, and Kohno 2025). We find that China and the EU enjoy reputational benefits from extending development finance, but there is little difference in project perceptions, suggesting that future research should be attentive to differences across donor and project appraisals. Our work is also situated in a growing normative enterprise in the literature to highlight the perspectives of citizens of low and middle-income countries – the ultimate beneficiaries of development assistance – to better understand how they view donors and development finance.

2. Foreign aid, public opinion in recipient countries, and donor competition

We situate our analysis within the broader literature on foreign aid, public opinion in recipient countries, and donor competition. The research linking development assistance to diplomatic alignment is often focused at the elite level, investigating whether recipient countries reorient foreign policy that is under the control of political leadership (Blair, Custer, and Roessler 2025; Lu 2024). However, for foreign aid to generate broader benefits for the donor's soft power (Nye 2017), aid must sway not only political elites but also generate goodwill among the public in recipient countries.

A growing body of work, mostly focused on the US as a donor, has investigated how and whether foreign aid impacts public opinion of the donor in aid recipient countries. Existing evidence is mixed, however, with some studies showing that aid improves public perceptions of the United States (Dietrich, Mahmud, and Winters 2018; Goldsmith, Horiuchi, and Wood 2014), while others find that citizens may be responding more to the leadership of the country than the aid their country receives (Constantelos, Diven, and Kilburn 2023).

More recently, scholars have begun investigating public perceptions vis-à-vis China. Wellner et al. (2024) show that in the long-run, the positive effects of the completion of Chinese-financed development projects on public support for the Chinese government in recipient countries are weaker for individuals who live closer to these projects, suggesting disappointment with the projects over time. Using Afrobarometer survey data, Huang and Cao (2023) examine the impacts of Chinese aid not on support for China as such, but on approval of one aspect of China's development model – the use of technocratic expertise to guide development – and find that African citizens are more likely to express support for technocratic management of the economy if they live near a Chinese aid project.

Unlike the United States and China, research on public opinion on EU aid in recipient countries has been relatively sparse. Fioramonti and Poletti (2008) highlight the EU's relative obscurity among the public in middle-income countries, like Brazil, India, and South Africa. However, where EU aid is more visible – as in top aid-receiving countries—Bodenstein and Kemmerling (2017) find that it provides an image boost: more EU aid is associated with greater favorability towards the EU among the public in African countries. Similarly, using data from the Pew Global Attitudes Survey, Schlipphak (2013) finds that individuals living in countries receiving more aid from the EU have a more positive assessment of the EU.

If foreign aid can enhance a donor's reputation among the public, what does this imply for competition and rivalry between donors? The literature suggests some level of zero-sum competition, though the effects are not always straightforward. Blair, Marty, and Roessler (2022) use Afrobarometer survey data to show that across African countries, those living near US aid projects tend to have weaker support for China and greater support for the US. By contrast, individuals living near Chinese aid projects report *reduced* affinity for China and greater support for the US. Rather than undermining US soft power, Chinese aid appears to be enhancing the US' stature and reported commitment to liberal democratic values.

Focusing on attitudes toward development projects rather than donors, other research examines whether the identity of a donor shapes project approval or the modality of aid delivery. These studies suggest that the wider public in recipient countries prefer aid from democratic, transparent donors and more hands-on aid conditionality from donors whom they trust (Clark, Dolan, and Zeitz 2025; Gafuri 2024; Hirose, Montinola, Winters, and Kohno 2025; Kim, Park, Rhee, and Yang 2025).

Our study contributes to this existing research on foreign aid and public opinion in two ways. First, the literature has usually examined the soft power benefits of aid for donors separately from project approval. In this study, we consider both, investigating whether the provision of aid boosts approval of a donor *and* whether donor identity matters for project approval. Second, studies have largely focused on the United States and China, as leading (and rival) bilateral donors, neglecting European donors, and especially the EU.

The EU is a unique donor. Though it is a multilateral entity, it has a domestic constituency and a foreign policy, which makes it fundamentally different from other multilateral donors like the World Bank, which is distant from the constituencies of its member states and does not have its own foreign policy objectives vis-à-vis recipient countries or other states. Instead, the EU is more like other bilateral donors, especially in its increasing rivalry and geopolitical competition with leading donors, especially China.

Nevertheless, EU development assistance is distinctive from that of other donors because it encompasses both resources disbursed by the Commission and EU-level institutions, such as the European Investment Bank (Howarth, Kavvadia, and Sadeh 2026) and national development agencies and development finance institutions (Bau and Dietrich 2026), with coordination among these entities even without the delegation of authorities and resources to the Commission (Basedow, Heldt, and Meunier 2026). While some scholars have focused on the EU's positioning in the middle of US-China competition (Biba 2025; Garcia Herrero 2019), others have examined the EU's competition with China independent of the US – especially within Africa (Hackenesch 2009; Hengari 2012). Such EU-China comparison is particularly valuable because the two do not operate in a vacuum. Recipient states are faced with a growing number of potential development partners, making aid competition as relevant as aid coordination.

3. The European Union's Global Gateway Initiative

The GG is a new framing of the EU's development assistance in geoeconomic terms, with development finance intended to achieve both geopolitical and commercial benefits for Europe. As such, the GG represents Europe's 'belated entry' into the global race for power projection through connective infrastructure (Lecha 2024, 117). Its ideational roots can be traced back to the 'External Investment Plan' proposed by the EU Commission in 2016 and the Europe–Asia Connectivity Strategy in 2017 (Basedow, Heldt, and Meunier 2026, Keijzer 2024).

Through the GG, EU member states seek to achieve multiple goals by collectively funding connective infrastructure. Some goals are centred on domestic economic interests – a response to increasing pressure from member states to leverage EU aid to promote commercial interests (Bau and Dietrich 2026). This dynamic of public funders being pressured to demonstrate 'value for money' in terms of domestic commercial benefit has been exacerbated by increasing competition with China in the Global South (Bunte, Gertz, and Zeitz 2022). Other goals are related to economic security, such as access to pivotal raw materials, with the GG used as an 'instrument of economic statecraft' toward these ends (Herranz-Surrallés 2026). More broadly, the GG's geostrategic objectives are to increase the effectiveness of EU development assistance to achieve the EU's foreign policy objectives.

While global geopolitical uncertainty since the beginning of the second Trump administration in early 2025 has prompted even greater EU attention to great power competition, the impetus and framing of the GG are aimed more squarely at competition with China, and the EU's ambitions to be an economic and ideological counterweight to China's growing influence in low and middle-income countries (Heldt 2023). The GG is, sometimes implicitly and sometimes explicitly, positioned as a rival to the BRI, which has cemented China's status as the main mega-infrastructure lender. While the billions of dollars of Chinese infrastructure projects may have spurred so-called win-win partnerships and also exacerbated debt vulnerabilities in some recipient countries, the BRI is not just an economic program (see Malik et al. 2021). It is also 'normatively loaded,' with an emphasis on sovereignty and non-interference (Lecha 2024, 181). Scholars have found that the BRI, and Chinese development finance more generally, has allowed China to extend its political influence in low and middle-income countries (Dreher et al. 2018).

When the GG Initiative was established, the EU was overt about the need to compete with China by providing an alternative to the BRI. As EU Commission President von der Leyen wrote on Twitter/X when introducing the GG, ' … we want to show that *democracies* and value-driven investments can deliver' (von der Leyen 2021, emphasis added). As such, the GG Initiative is centred on six core principles: (1) democratic values and high standards (2) good governance and transparency (3) equal partnerships (4) green and clean (5) security focused and (6) catalysing private sector investment (European Commission 2026).

While equal partnerships, security focus, and enhancing private investment are broadly similar to the BRI, the emphasis on democratic values, good governance, transparency, and environmental sustainability is distinctive. It positions the GG as a tool not only for pursuing Europe's collective economic and security interests, but also for power projection and norm diffusion – exporting democratic values and standards of good governance, transparency, and sustainability in areas where China has instead been supporting values closer to the 'Beijing consensus' (see Halper 2010). The EU is responding to Chinese competition partly by adopting a similar focus on infrastructure while also offering an alternative approach consistent with its own institutions and the expectations of its domestic constituencies, which it hopes will be beneficial in reputational competition in recipient countries.[4]

Given this discursive framing of the GG as an alternative to the BRI, emerging research on the GG, including papers in this special issue, have analyzed the GG not only in terms of the history of EU development policy (Carbone 2026), but also its ability to challenge the dominance of China's BRI (Heldt 2023; Karjalainen 2023). Anecdotally, there is evidence of some recipient governments, like Nigeria, welcoming the GG, with its influence on European investments (Angbulu 2023).

But geo-economic rivalry between global powers is not simply about projecting influence among developing-country governments. It is also about increasing support among the mass public towards the EU – especially in regions, like sub-Saharan Africa, where knowledge of the EU has been less widespread (Keuleers 2015). In the long-run, increasing favourability towards the EU among African citizens might not only persuade them to support government policy that seeks more engagement with the EU, including through trade and investment by EU firms; but it could also lead these citizens to advocate for the adoption of a European development model, as opposed to a Chinese one.

4. Theory and expectations

We investigate whether learning that a project is funded by the EU or China (1) improves attitudes toward either donor (soft power) and (2) improves perceptions of the project in question (project approval). While we do not directly observe how these two donors compete for soft power in recipient countries, we use responses towards the EU and China and the projects they fund to understand which donor is able to garner public support and why.

On average, we expect that development projects are perceived positively and lead to greater favourability for both donors. However, since China is a better-known donor than the EU, respondents may already have stronger associations with China and therefore may not update their opinion about China upon hearing about a Chinese-financed development project. By contrast, since the EU is a less well-known donor, especially in the case of infrastructure projects, there might be a greater likelihood of improving attitudes toward the EU by telling respondents about an EU-funded project. Evaluating whether the EU enjoys a reputational boost from being associated with an infrastructure project, and how this compares to China, can shed light on whether the projects of the GG are likely to achieve the EU's soft power aims.

We also examine whether learning that a project is funded by the EU or China improves perceptions of the project in question. We expect that citizens are likely to be broadly supportive of a development project regardless of the funder if the project directly addresses an issue that affects living standards, like energy access. However, if recipients are *more* enthusiastic about a development project from a *specific* donor, an array of mechanisms might explain why. We consider three mechanisms to be particularly relevant: donor understanding of recipient needs, expectations about project quality, and concerns about corruption. These aspects of a project and donor-recipient relationship that might drive citizen perceptions are closely linked to how the EU has branded the GG. While acknowledging the strategic motivations behind the GG, the EU concurrently highlights an approach that still accounts for, and effectively addresses, the development needs of recipient countries (Christidis et al. 2024, 29). Moreover, in launching the GG Initiative, the EU has also emphasized the effectiveness and good governance as characteristics that distinguish its funding approach from that of China (Karjalainen 2023).

In evaluating these mechanisms that might explain greater approval for EU-funded finance, we consider how certain qualities of the EU – including good governance and transparency – affect citizen responses to EU infrastructure projects. This is similar to the work of Schlipphak (2013) and Isani and Schlipphak (2017), which explains international approval of the EU with reference to an individual's support for EU values, especially economic integration and openness.[5] They find that citizens with a more positive attitude toward free trade and economic openness also have a more positive assessment of the EU. Given the context of development cooperation and infrastructure projects in our study, we focus our mechanism analysis on how individuals appraise the EU and China on relevant attributes of effectiveness and corruption, rather than broader attitudes toward economic openness. We discuss the expected impact of each of these associations in turn.

First, citizens might associate a particular donor with a better understanding of the problems that their country faces, leading them to be more supportive of the project. By contrast, if they think that a particular donor is less attuned to these problems, they might hold less favourable views about the project as well as the donor. There are reasons to expect China to be perceived as having a better understanding of the problems of recipient countries, given highly visible Chinese-funded projects, like railways and bridges, which are filling Africa's infrastructure gaps. Using Afrobarometer survey data, Lekorwe, Chingwete, Okuru, and Samson (2016) indeed suggest that positive perceptions of Chinese influence in Africa are likely driven by China's 'infrastructure/development and business investments' across African countries.

Second, citizens might associate either the EU or China with certain project characteristics, including project quality (see Winters, Dietrich, and Mahmud 2017). Some scholars have suggested that citizens associate Chinese products and development projects with poor quality (Lekorwe, Chingwete, Okuru, and Samson 2016; Wellner et al. 2024). But Ben-Enukora, Okoye, and Babatunde (2025) argue that local media portrayal of Chinese-funded projects in African countries are generally much more positive than Western media representations. Citizens might thus perceive larger Chinese development projects – the kind of which are often reported in the news – as being of good quality. Unlike China, EU projects in Africa have not generated similar media attention (Keuleers 2015).

Third, we might expect more positive perceptions about EU-funded projects compared to Chinese projects in terms of links to corruption. While the GG is a late-comer to infrastructure finance in the region compared to China's BRI, the EU has long engaged with African countries through broader pro-democracy and good governance assistance, including the deployment of election observers (Fioramonti 2009, 5, 9). Even in African countries where EU finance might be less well known, EU-funded projects might still be more likely to be perceived as less corrupt, especially relative to Chinese-funded projects, which have often been linked to local corruption (Brazys, Elkink, and Kelly 2017; Dreher et al. 2019; Isaksson and Kotsadam 2018).

5. Case selection

We focus on sub-Saharan Africa (SSA) because it has often been a target for global power competition (Blair, Marty, and Roessler 2022; Chen and Wang 2024; Hengari 2012; Men and Barton 2011) and it is a 'regional priority' for the GG, with over half of funding from 2023 to 2027 earmarked for SSA (Tagliapietra 2024, 1330). In fact, one of the main objectives of the GG initiative is to increase the EU's visibility in Africa (Keijzer 2024, 85). Nearly all countries in the region have also signed onto the BRI. In 2021, China accounted for 17% of sub-Saharan African external public debt, making the country the largest bilateral official lender to countries in this region (Abdel-Latif, Chen, Fornino, and Rawlings 2023).

The EU and China have also faced backlash in SSA regarding their global infrastructure initiatives – suggesting that both stand to gain from more positive perceptions among SSA citizens. Where Chinese loans have been lauded for providing African governments with more decision-making power, they have also been criticised for their debt traps (Were 2018). The EU has alternatively been accused of prioritising geopolitical power projection through the GG over genuine interest in infrastructure development that enhances the agency of African countries (Farand 2021).

We chose to focus specifically on South Africa and Nigeria for several reasons. First, both are recipients of BRI-linked loans as well as GG projects. This makes them relevant settings to examine our expectations about public perceptions towards Chinese and EU-funded development projects. Chinese lending to South Africa saw significant growth especially after 2016 (Acker and Brautigam 2021, 4). Nigeria was one of China's top loan recipients between 2000–2023 (Engel, Hwang, Morro, and Bien-Aime 2024, 2). The EU has also engaged with these two countries under the GG umbrella, with more than € 280 million in committed investments to support South Africa's just energy transition and plans to invest at least € 820 million towards digital transformation in Nigeria.[6]

Second, South Africa and Nigeria are two of the most strategically important countries for both the EU and China in SSA. They are the largest economies in the region, making them economically important to Chinese and European firms looking to expand into African markets. As a major trading partner, South Africa is the only African country with a Strategic Partnership with the EU – and one of only ten globally. As a member of the BRICS following China's formal invitation in 2010, the country has also formed deep strategic partnerships with China (Alden and Wu 2014; Taylor 2014a; Wasserman 2012). Meanwhile, Nigeria is Africa's most populous country, and with regional leadership roles, it has long been a key target of global power influence (Mthembu-Salter 2009; Taylor 2014b).

By focusing on two larger, middle-income countries, we somewhat narrow the generalisability of our findings to smaller, poorer SSA countries. However, the infrastructure projects central to the GG are targeted toward middle-income countries. Based on publicly announced projects, the top GG partner countries are Tanzania (lower middle-income country, LMIC), DR Congo (low-income country, LIC), Nigeria (LMIC), Senegal (LMIC), Egypt (LMIC), Kenya (LMIC), and Zambia (LMIC) (EU 2025). Since the objective of many GG projects is to generate commercial opportunities for private firms and DFIs, they are aimed at countries with sufficient economic and political stability and large enough markets for commercially viable projects (Bau and Dietrich 2026). Therefore, insights from Nigeria and South Africa will be indicative of the likely reaction in similar SSA countries that are current or future GG partners.

6. Survey design and methodology

We use an online survey with a vignette experiment fielded to respondents in South Africa and Nigeria to investigate how attributing a development project to either the EU or China affects public attitudes toward each donor and approval of the development project.[7]

The survey in South Africa was distributed by the survey firm Pure Spectrum between February 11 and 26 February 2025. They survey in Nigeria was distributed by the survey firm Lagos Green Transport between March 12 and 20 April 2025. In both cases, respondents required an internet-connected device to complete the survey on the Qualtrics platform. The survey was administered in English.

The survey firms recruited respondents from existing panels or relied on panel companies to distribute the survey. Respondents needed to be 18 years or older and a citizen of the country in which the survey was conducted. In South Africa, the survey was distributed through multiple opt-in panel portals, consistent with the structure of commercial panel recruitment, meaning we cannot know how many individuals saw the survey invitation.[8] However, we can know how many of the individuals who clicked on the survey link completed the survey (29%). In Nigeria, the survey was distributed directly to an existing panel of opt-in respondents maintained by the survey firm, allowing for a direct observation of the response rate (37%). In both cases, responses were removed if respondents were ineligible or there were quality concerns. In addition, we removed responses that failed an attention check question and those that were completed in less than 10 minutes. After these quality checks, we obtained a sample of 2,011 responses in South Africa and 1,571 responses in Nigeria.[9]

We asked both survey firms to apply soft quotas on age and gender, so as to generate a broadly representative survey.[10] However, since the survey required an internet-connected device, and given the composition of the panels available to the survey firms, the final sample in each country was slightly more urban and much more educated than the population as a whole.[11] We did not directly ask about respondents' cash income, but we did ask questions about hardship and lived poverty modelled on questions in the Afrobarometer survey. According to these indicators, survey respondents have a broadly similar level of lived poverty as the population as a whole.[12] Although the sample is broadly representative of the population along some attributes, the differences in education and urbanisation mean that the sample does not map directly onto the population. However, we believe that this sample is very valuable for studying public opinion on aid relations, since this segment of the population is likely to be the most influential in shaping government policy, including relations with aid donors.

The survey began with respondents answering simple background questions before being presented with the vignette. The vignette describes a hypothetical development project in the energy sector. Because we want to ensure comparability, we focus on the major outcomes and objectives of the energy project that are similar across European and Chinese projects, and that capture key aspects of the project that policymakers would want to communicate to citizens. We drafted the text based on similar descriptions of projects in the GG and the BRI. We inform respondents about the benefits of the potential energy project, specifically noting that:

> The project would expand electricity supply and strengthen the electricity grid across [South Africa/Nigeria] by adding further energy-creating stations, building new mini-grids, and improving national transmission networks. This would reduce power disruptions across the country and benefit millions of [South Africans/Nigerians]
>
> The project is financed by [Control / China / EU]

Respondents were evenly split to be randomly assigned to one of three treatment conditions, each with a different description of the donor as outlined in Table 1.

The vignette focuses on an energy project because energy is a key focus of both the BRI and the GG, making it plausible to attribute the same hypothetical project to both sets of donors.[13] Moreover, the existence of significant energy access gaps in Nigeria and South Africa, both of which experience frequent power outages, make these development projects focused on electricity grids popular among recipient governments; and these projects can generate clear benefits for citizens who would benefit from uninterrupted power supply. This would not only improve living standards but would also reduce the

Table 1. Treatment conditions.

Condition	Text
Control	"one of [the country's] major donors"
China	"China as part of its Belt and Road initiative"
EU	"the European Union, an international institution made up of European states, as part of its Global Gateway initiative"

cost of business for local firms (Adanlawo and Vezi-Magigaba 2021; Amadi 2015; Lawson 2022).

The vignette describes a *hypothetical* development project rather than actual development projects for several reasons. First, by describing a hypothetical project, we can hold attributes of the project constant while only varying the identity of the donor. This allows us to isolate the impact of donor identity on our outcomes of interest. Second, the GG initiative is still quite new and many respondents may not have been exposed to or benefited from an EU-funded project, or may not be aware of the EU as a funder. At the same time, respondents are more likely to have been exposed to or be aware of Chinese-funded energy projects, meaning that respondents may have stronger prior associations with actual Chinese-funded projects than completed EU-funded projects. Finally, with a hypothetical energy project, we can be vague about its location within the recipient country, whereas with a real project, respondents' reaction may be more influenced by their proximity to the project.

The China and EU treatments are intended to be fairly simple, only providing the identity of the donor, and in the EU case, a short description of what it is. We choose to include this description of the EU ('an international institution made up of European states') because, unlike China, we anticipate that several respondents may not immediately know what the 'European Union' is.[14] Admittedly, if respondents have positive or negative associations with the phrase 'international institution,' the more detailed description of the EU may impact the estimates of the treatment effect of ascribing the project to the EU. However, we believe that the compromise in symmetry across treatments is a worthwhile trade-off to ensure that respondents are providing informed answers and generating meaningful data.[15]

Our outcome measures come from a series of questions after respondents see the treatment. To test the impact of donor identity on donor approval, we ask respondents how positively they feel about the influence of China, the EU, and other donors and international organisations on their country. The wording of the question is based on similar questions in the Afrobarometer (see Appendix C for the exact wording).

To investigate the impact of donor identity on project approval, we ask eight different questions capturing reactions and anticipated effects of the project (these are listed in Appendix C). These include questions about whether the respondents are enthusiastic about the project. We also ask if respondents think the project would be of good quality, would be affected by corruption, and would affect government debt and employment in the country. We test the impact of the treatment on each of these outcomes separately. The differences across these measures allow us to test whether respondents perceive Chinese-financed projects to be more impacted by corruption, for example, or whether EU-financed projects are perceived as being of good quality overall.[16]

We pool the survey data from Nigeria and South Africa for several reasons. First, Nigeria and South Africa are both middle-income countries. As such, by comparison to respondents from countries that are on the extreme end of the income spectrum, respondents from one country are not more likely than those in the other country to react positively because they are in more desperate need of aid. Moreover, Nigeria and South Africa have both been recipients of BRI projects and EU development finance, including unbranded

EU finance and projects attached to the GG brand. At the same time, these are countries with large markets—-the kind of which are targets for the Global Gateway and its commercially-driven pillars. Citizens in these countries also have shared experiences with unreliable electricity supply, making our vignette especially relevant across both Nigerian and South African respondents.

7. Results

7.1. Donor approval and project perception

Both the EU and China enjoy a reputational benefit from being identified as the project's funders, but this effect is more pronounced for the EU. Table 2 shows the treatment effects on two questions: First, whether respondents believe the donor has a positive influence on South Africa and Nigeria and second, how they would rank a list of seven donors if their country had to request foreign assistance. For the second question, we recode the variable to capture whether a respondent ranked the EU or China first in their list of donors.

The results in Table 2 demonstrate the positive reputational effects that the EU and, to a lesser extent, China derive from being known as the project funders. Column 1 shows that respondents who are told that the energy project was funded by the EU are more likely to say that the EU has a positive influence on their country, compared to the control condition. This variable is measured on a 4-point scale, and average perceptions of the EU's influence are positive at 2.83. Compared to the control, respondents in the EU treatment rated the EU 0.12 points more highly, about 0.13 of a standard deviation.

Hearing that the EU is the donor of the electricity project also makes respondents more likely to prefer EU funding in the future. Column 2 shows that respondents are more likely to rank the EU first as a possible future donor, compared to the control. In the control condition, the EU is ranked first by only 6.43% of respondents.[17] This is a sign of the low familiarity with the EU and limited sense of the EU as a development financier. However, for respondents who are told that the EU is funding the project, the share for whom the EU is a first choice increases to 20.23%. For the GG, these results suggest that clear EU branding of infrastructure projects can increase positive perceptions of the EU and help make it a partner of choice, generating some of the soft power benefits to which the EU aspires.

By comparison to the EU, China does not enjoy as sizeable of reputational benefits from being identified as the project funder. Column 3 shows that there is no statistically

Table 2. Treatment effect on donor approval and ranking.

	(1) EU: Positive influence on country	(2) EU: Ranked first	(3) China: Positive influence on country	(4) China: Ranked first
T1 EU	0.125***	0.139***	−0.0916**	−0.0318 *
	(0.0376)	(0.0140)	(0.0394)	(0.0187)
T2 China	−0.0133	−0.0231***	−0.0411	0.0925***
	(0.0370)	(0.00888)	(0.0387)	(0.0197)
Observations	3569	3528	3569	3528

Controls not reported: Gender, age. Robust standard errors in parentheses *$p < 0.1$, **$p < 0.05$, ***$p < 0.01$.

significant effect of the China treatment on respondents' perception of China's influence on their country. Column 4 shows that the China treatment leads to more respondents ranking China first as a potential future donor, but the increase is smaller than for the EU. While perceptions of positive influence are similar for China and the EU (an average of 2.82 for China and 2.83 for the EU), there appears to be a ceiling effect for ranking future donors, likely because of higher familiarity with China. In the control, 32.3% of respondents rank China first. The China treatment increases this to 41.5%, a meaningful increase, but smaller than the EU's increase of nearly 14 percentage points from its much lower baseline.

Across these results, there is some evidence of zero-sum competition. When respondents are told that China is the funder of the electricity project, they become *less likely* to rank the EU first, as column 2 shows. Similarly, when respondents are told that the EU is the project funder, they become *less likely* to perceive China as having a positive influence on their country, as column 3 shows. Since these comparisons are between a named donor in the treatment condition and an unnamed donor in the control condition, it suggests that hearing about the infrastructure funding of a particular donor makes other partners seem less attractive by comparison. Moreover, when respondents are choosing which donor to rank *first* from among a list of donors, if the treatment encourages them to rank the named donor first, this will 'by definition' make it less likely that they rank another donor first.

Turning to respondents' reaction to the project itself, Table 3 shows the difference in respondents' enthusiasm about the project, depending on whether the donor is identified as the EU or China. Compared to the control, respondents rate their enthusiasm *more highly* when the project is attributed to China. There is no such effect for the EU. However, the substantive effect of this 'China boost' is not very large. Enthusiasm is measured on a ten-point scale. Average enthusiasm across all three treatment conditions is high, at 6.5, since respondents are generally happy to hear of a hypothetical energy project. All else equal, being told that China is funding the project leads to a 0.2 point increase in enthusiasm – only 0.07 of a standard deviation on the enthusiasm variable.

Overall, these results suggest that clear association of the EU with infrastructure projects can improve public attitudes toward the EU. They imply that EU branding of GG projects is essential for these projects to achieve their broader foreign policy objectives. Because of low familiarity and association of the EU with infrastructure finance, they

Table 3. Treatment effect on enthusiasm about project.

	(1) Enthusiasm about project
T1 EU	0.125
	(0.109)
T2 China	0.194*
	(0.109)
Observations	3519

Standard errors in parentheses Controls not reported: Gender, age. Robust standard errors in parentheses *$p < 0.1$, **$p < 0.05$, ***$p < 0.01$.

also indicate that the EU can enjoy a greater reputational boost than China, which already has a more established reputation. These findings are consistent with the general expectations we set out in Section 6.1. Respondents are largely positive about the infrastructure project and hearing that it is funded by a particular donor makes them more positively disposed toward that donor. With no strong name recognition, the EU enjoys greater upside from this reputational boost.

7.2. Mechanisms

Next, we use more granular measures to tease out whether there might be some aspects of the donor-recipient relationship or the project that would lead respondents to react differently to EU- or China-funded infrastructure. We consider a number of measures related to the three broad mechanisms we outlined in Section 6.1: donor understanding of recipient needs, expectations about project quality, and concerns about corruption. Table 4 reports treatment effects for respondents' assessments of the donor-recipient relationship, while Table 5 reports treatment effects across various questions about project attributes.

When we examine respondent perceptions of the donor-recipient relationship in Table 4, we find that respondents have fairly negative appraisals of both the EU and China. We ask whether respondents believe that the donor 'understands the problems that [their country] faces,' and find that compared to the control, respondents seeing the EU and China treatments are *less likely* to identify the donor as understanding the country's problems, as column 1 in Table 4 reports. Compared to an unnamed donor, respondents believe that neither the EU nor China has a good understanding of their country's problems. Strikingly, there is no statistically significant difference between the

Table 4. Treatment effects on perceptions of donor-recipient relationship.

	(1) Donor understands country's problems	(2) Country should have final say when disagreements arise
T1 EU	−0.159***	0.114**
	(0.0468)	(0.0481)
T2 China	−0.113**	0.296***
	(0.0470)	(0.0475)
Observations	3561	3563

Controls not reported: Gender, age. Robust standard errors in parentheses *$p < 0.1$, **$p < 0.05$, ***$p < 0.01$.

Table 5. Treatment effects on project perception.

	(1)	(2)	(3)	(4)	(5)	(6)
	Confidence in project quality	Expect finance to be expensive	Expect project to worsen debt	Expect positive effect on employment	Expect involvment of local firms	Likelihood of corruption
T1 EU	0.0986**	−0.260 **	−0.0139	−0.0174	−0.0594	−0.123**
	(0.0335)	(0.0545)	(0.0450)	(0.0390)	(0.0416)	(0.0390)
T2 China	0.0897**	−0.140**	0.00554	−0.000260	−0.164**	−0.129**
	(0.0331)	(0.0542)	(0.0454)	(0.0372)	(0.0455)	(0.0390)
Observations	3563	2439	2940	3550	3401	3564

Controls not reported: Gender, race, age. Robust standard errors in parentheses *$p < 0.05$, **$p < 0.01$.

EU and China on this measure, even though China has a longer history of providing infrastructure finance in SSA and often touts its own development experience in making the case for South-South cooperation.

Similarly, when we ask respondents about how disagreements between the donor and the government should be resolved, both the EU and China treatment cause respondents to be *more likely* to say that their country should have the final say in disagreements, as shown in column 2 of Table 4. Compared to the control, attributing a project to either China or the EU causes respondents to want their government to have more say over the project in instances of disagreement. In this case, there is a statistically significant difference between the China and EU treatments, with respondents even more likely to assert the policy autonomy of their government if the project is funded by China.

To the extent that the GG is in direct competition with China's BRI, these results suggest the EU is not at a comparative disadvantage in respondents' trust. In general, though, the EU may need to do more to demonstrate that it understands the problems and development needs of recipient countries to gain greater soft power benefits from GG projects.

The granular results on project perception, reported in Table 5, also suggest that respondents do not strongly distinguish between the EU and China. This indicates the EU does not have an existing reputational advantage vis- à -vis China, but also that the GG may not need to fight an uphill battle to persuade the public in recipient countries.

We consider five indicators related to project quality, including several dimensions on which Western media commentary often criticises Chinese-financed projects. If the EU in fact performed better on these dimensions, it could make it easier for the GG to enhance the EU's soft power. As reported in column 1 of Table 5, both the EU and China treatment are associated with *higher* confidence that the project will be of good quality, and there is no statistically significant difference between China and the EU in this regard. Compared to the control condition, both the EU and China treatments are associated with *lower* anticipated project finance costs, as reported in column 2 of Table 5. There are no statistically significant treatment effects for impact on government debt and local employment (columns 3 and 4).[18]

Only the China treatment elicits a statistically significant expectation of lower involvement of local firms (Column 5 of Table 5). This is consistent with the fact that Chinese loans are often export credits that require contracting with Chinese firms (Brautigam 2009), perhaps leaving less room for local firm participation. Given that GG projects are intended to generate commercial benefits for European firms (Basedow, Heldt, and Meunier 2026; Bau and Dietrich 2026), this may not be the dimension along which the GG is best placed to outcompete the BRI.

Finally, we ask respondents whether they think the project will be associated with corruption. Compared to an unnamed foreign donor, both the EU and China reduce the expected likelihood of corruption, and there is no statistically significant difference between them. Perhaps surprisingly, given the common concerns in Western commentary about corruption of Chinese development finance, as well as scholarship showing that local corruption increases around Chinese-funded projects (Brazys, Elkink, and Kelly 2017), respondents expect lower levels of corruption when they hear a project is funded by China. Thus, although attributing funding to the EU leads to lower expectations of corruption, this is no better than when the project is attributed to China. Despite the GG's emphasis that it can deliver infrastructure projects with better governance standards than alternative sources, especially China, the EU does not engender significantly lower expectations of corruption than China in this sample.

Across these more granular dimensions, the results indicate that respondents do not strongly distinguish between the EU and China when evaluating the donor-recipient relationship or the infrastructure project itself. This suggests that the EU faces neither significant headwinds nor tailwinds when using GG projects for geopolitical competition with China. Respondents in our samples in Nigeria and South Africa, which are more educated than the population as a whole and therefore likely to be slightly better informed about donors, do not have consistently different views about China and the EU that lead them to react differently to them as funders of infrastructure. Combined with the results showing that the EU can boost its reputation by being an identifiable project funder, this suggests that the EU may reap soft power benefits as GG projects become better known, especially if it can improve perceptions of its understanding of recipients' development needs.

8. Conclusion

Our paper examines attitudes toward EU- and Chinese-financed development projects in South Africa and Nigeria. We find that both the EU and China experience reputational benefits from providing development finance, though this effect is greater for the EU. Notably, the share of respondents ranking the EU as their most preferred donors rose markedly – from six percent in the control group to twenty percent among those exposed to the EU treatment. This 'low baseline, big update' pattern is consistent with low levels of prior familiarity. It suggests that greater EU visibility in GG projects could yield soft-power returns. However, we find that there are no systematic differences in how respondents evaluate a development project when the project is funded by the EU or China. For the GG, this suggests that the EU has somewhat of a blank slate on which it can develop its reputation with its expanding infrastructure finance portfolio.

There are some limitations to the study worth noting. First, our survey samples are not fully representative of the South African and Nigerian population. Given the online nature of the survey, it generated responses from individuals that are more educated and more urban than the general population. We should therefore exercise caution when interpreting these results as indicative of how the entire public is likely to respond to donors. It is likely that the public as a whole has even less knowledge of aid donors, though it is unclear whether this would lead to more or less positive reactions to aid-funded infrastructure projects.

A second limitation of the study is that public opinion is only one input, and sometimes a small one, into countries' foreign policies and decisions about how to triangulate among competing great powers. However, for foreign policy influence in the Global South to be enduring, it must enjoy some public support. The segments of the public that are likely to be influential in shaping foreign relations are those with greater human capital and access to institutions, such as those urban and more educated respondents in our sample. Therefore, we suggest there is still something meaningful to be learned from the results of the surveys.

In particular, our findings suggest that the GG has the potential to act as a tool of soft power projection and thereby assist the EU in its efforts to pursue great power competition. Other papers in the special issue highlight the EU's aspirations for the GG to respond to China's use of development finance for the purposes of great power competition

(Basedow, Heldt, and Meunier 2026). Our findings indicate that if infrastructure projects are in fact clearly associated with the EU and comparable to Chinese projects, then the EU could enjoy reputational benefits from these projects. Our survey findings are especially valuable because few GG projects have come to fruition yet, making it difficult to study actual reactions to these projects.

As more GG projects are completed, future research should study local reactions to them. Research on Chinese development finance has benefited from geolocated data to shed light on the local dynamics emerging from proximity to Chinese-funded projects (Brazys, Elkink, and Kelly 2017; Wellner et al. 2024; Zeitz 2021). Similar work on implemented EU projects could explore whether the public differentiates between EU- and Chinese-funded projects when they have concrete experience of them. Given that our work shows both the EU and China are thought to have a weak understanding of recipient country's problems, future work should investigate whether co-financing with a local partner can overcome gaps in trust and perceived understanding (Anyiam-Osigwe, Dietrich, and Zeitz 2026). Future work may also want to explore whether the public sees GG projects differently when they understand that such projects are also intended to generate commercial benefits for EU firms (Bau and Dietrich 2026). Our results suggest that individuals believe Chinese-funded projects involve fewer local firms, but have no such association with the EU. This may shift as more GG projects, intended to connect European firms to commercial opportunities, are completed.

Notes

1. Authors' calculations from Afrobarometer (2023).
2. Note that the question about the EU was only asked in 25 out of the 39 countries in the round.
3. This positive assessment of China among the African public compares to far less favourable views of China among the public in Western countries. A YouGov study in 2019 found that only 24% of respondents in Sweden, 30% in Germany, 32% in Denmark, 36% in France, and 38% in Spain said that China has a 'positive effect on world affairs' (Waldersee 2019).
4. On strategies of emulation or differentiation vis- à -vis China, see Zeitz (2021).
5. In the case of Isani and Schlipphak (2017), the analysis also considers how Arab citizens are less supportive of the EU if they more strongly believe in sovereignty as freedom from external demands.
6. See European Commission (2023) and European Union (2022).
7. This survey received ethics approval and all participants provided their informed consent (Princeton University Institutional Review Board (IRB): No. 17336).
8. Pure Spectrum pulled respondents into the survey from two panel companies: Prime Insights and CPX, which each recruit respondents through various online channels including social media platforms, games, and through paid advertising.
9. This survey was part of a larger research project. These sample sizes only reflect the treatment conditions included in the analysis in this article. The full samples with all treatment conditions were 4,061 responses in South Africa and 3,656 in Nigeria.
10. Table A1 in the Appendix shows how closely the age distribution in our survey compares to age distributions in the population. In South Africa, respondents were 48.9% male and 51.1% female. In Nigeria, respondents were 51.6% male and 48.4% female.
11. See Appendix A.
12. For instance, 24.9% of respondents in the Nigeria sample said they had gone without medical care most of the time or always in the last 12 months, compared to 25.9% of Nigerian respondents in the Afrobarometer survey. In South Africa, the incidence was 14.7% in our sample compared to 17.34% in the Afrobarometer (Afrobarometer 2023).

13. Bau and Dietrich (2026) show that energy distribution and energy generation from renewable sources are among the top three sectors by project size in the approved projects they analyze.
14. The high levels of 'Don't Know' responses in the Afrobarometer questions about the influence of the EU – 27.2% for the EU compared to 19.6% for China – led us to believe this would be useful. Afrobarometer (2023).
15. Table B1 reports results of a manipulation check, showing that the treatment affected respondents' understanding of who funded the project. In the case of the EU treatment, 61.8% of respondents correctly identified the EU, and in the case of the China treatment, 60.4% correctly identified China as the funder. This rate is consistent with or even higher than similar surveys. Dietrich, Mahmud, and Winters 2018 find that after they inform respondents in Bangladesh that a health clinic was funded by the US, only 24% correctly identify the US as the funder.
16. See Table B2 for summary statistics, Table B3 for balance across treatment conditions, and Appendix C for the full battery of questions.
17. This is lower than China, which is ranked first by 32.3% of respondents in the control condition, or the World Bank, which is ranked first by 18.8% of respondents, but comparable to the UK, ranked first by 7.7%.
18. Note that for the expectation of the cost of financing and the impacts on debt management, we exclude those respondents who say they 'cannot make a best guess,' which is a sizeable number, given the technical nature of the question.

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