

# The Global Gateway at two: Implementing EU strategic ambitions

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By Chloe Teevan and San Bilal

## Summary

The recent Global Gateway Forum provided an opportunity to highlight progress on the Global Gateway, the European Union's (EU) global connectivity strategy, which is two years old this week. The initiative aims to increase EU external investment and provide a more streamlined way to package EU international cooperation and investment, while in practice providing an alternative to China's Belt and Road Initiative and strengthening the EU's global influence. With around 160 flagship projects identified for 2023 and 2024, the Global Gateway has begun to gather steam, but challenges remain.

In this brief, we look at how the Global Gateway can make real progress towards operationalising a much-needed reorientation of EU international cooperation objectives and instruments to meet partners' needs and to respond to current geostrategic realities. Achieving its investment target of €300 billion is crucial for the EU's credibility. To do this – and possibly surpass it in the future – the EU and member states will need to enact a genuine shift in business practices. This

includes rethinking their collective development cooperation objectives and taking a whole-of-government approach. This can happen through a series of political and technical evolutions, including on the narrative, the policy direction, the approach to partners, and the toolbox.

## Introduction

It has been two years since the European Union's (EU) flagship global connectivity strategy, the [Global Gateway](#), was launched. The recent [Global Gateway Forum](#) provided a moment for the EU to reflect on the status of this new geostrategic initiative that aims to connect "countries and regions around the world, by encouraging public and private investment in a global network of transportation and supply chains, green energy, modern telecommunications, education and research," to provide partners across the world with an alternative to China's Belt and Road Initiative and to reinforce the EU's global influence. The event reflected the European Commission's desire to show progress (announcing some ambitious new projects), to touch base with partners from across the world (including some 40 high-level government representatives), and perhaps to also make sure that any future Commission sticks with the strategy.

Two years on and with up to 160 flagship projects identified for 2023 and 2024, the Global Gateway has become the main point of reference for the EU's international cooperation across five pillars – digital transformation, green energy, transport, education and health. It has also gained momentum thanks to enthusiastic promotion by European Commission President Ursula von der Leyen, both within the EU institutional apparatus and internationally. As we have [argued in the past](#), perhaps the most important element of the Global Gateway is to shift the way the EU approaches international partners, bringing together the full range of foreign, development and economic tools in a more strategic manner along with a win-win narrative.

It marks a real shift in the approach to partners in Africa, Asia-Pacific and Latin America and the Caribbean, answering a need for more infrastructure and investment spending, coupled with a clearer statement of EU interests and values.

This change marks a necessary step to enable the EU to respond more clearly to partners' interests and demands and to be conscious of the much more [politically charged times we live in](#). Yet in the months and years to come, a great deal of work is still necessary to ensure that the Global Gateway lives up to its ambitions.

To reach the €300 billion target and achieve the kind of strategic shift that the Global Gateway aims at, some further adjustments are going to have to happen beyond what has taken place to date. Presenting the Global Gateway as the EU's alternative to China is one thing, but actually making that alternative a reality is going to require further political and technical evolutions. In this note, we look at how a necessary rethinking and re-positioning of EU development cooperation objectives and instruments can be operationalised. This includes a further evolution in the narrative, the establishment of a whole-of-government approach at the EU level, further adjustments in the approach to partners and a new toolbox. By breaking away from traditional, often too segmented approaches to development, economic and foreign relations, the EU can better align its policies and instruments with its geostrategic ambitions. At two years old, the Global Gateway is still a toddler. But in our turbulent and increasingly fragmented world, growing fast is imperative.

## **A recap on the Global Gateway**

The Global Gateway brings together a strategic vision for EU external investment and development cooperation projects with [strong rhetoric about EU values](#). It does not entail additional development aid and is not a single instrument or fund, but seeks to mobilise development finance at scale by building on existing EU mechanisms and approaches. These include the EU budget instrument for external action, the Team Europe approach and initiatives (TEIs), and the policy-first approach, which aims to give a clear direction to EU development cooperation. It brings together a range of European public and private actors from finance, development and various economic sectors around a connectivity strategy focused on strategic corridors for transport, energy and digital infrastructure, together with investments in health and education.

The 2023 list of Global Gateway flagship projects was a bit of a strange ensemble of major strategic projects and smaller projects that sit somewhat oddly together. Meanwhile, even if the target of €300 billion in finance mobilised under the Global Gateway is arbitrary and must ultimately be a step towards [achieving something much bigger](#), it is clear that the EU will be held accountable, internally and by its partners and that achieving this target will be vital for its credibility. Certain officials interviewed had the perception that the drive to reach financing targets and to achieve visibility may explain why large infrastructure projects, in practice easier to deploy in emerging markets than in poorer and more fragile contexts, seem to be privileged under the Global Gateway.

## Adjusting the narrative

The European Commission leadership has made clear its enthusiasm and commitment to the Global Gateway, which is presented as its offer in a “[battle of offers](#)”. The strategy is consistently presented as a win-win for partner countries and for the EU, and for more clearly presenting EU interests and values. This is certainly a significant step forward if the EU wishes to change the conversation when it comes to global infrastructure investments and make the EU a byword for these kinds of investments in the way that China currently is ([Luthra 2023](#); [Mardell 2023](#); [Olivie and Santillán O’Shea 2023](#)). The main element of this is clearly delivery and impact, which we will touch on further below. Yet, it will also be essential that the EU’s offer is tailored to different audiences, focusing less on China and more on partners’ needs.

At the Global Gateway Forum, Ursula von der Leyen and other top leadership largely focused on highlighting win-win partnerships and projects with high impact, but couldn’t resist also beginning the whole event by painting a negative picture of China, a tendency that is perceived as patronising by many. This rhetoric seems to present a choice between the EU and China. At the Global Gateway Forum, Ursula von der Leyen put a clear focus on why the EU offer is better than that of others, highlighting the perceived flaws of those [others](#). Yet most partner countries are simply neither in the position nor willing to choose

between the EU and China. As [stated](#) by Bangladeshi Prime Minister Sheikh Hasina, “Our foreign policy is very clear – friendship to all; investment for our own development. [...] we need investment – from every country. Everybody, according to their choice, can invest; we assess whether it is suitable for our country”. Similarly, Kenya’s President William Ruto [emphasised](#) that “We are open to anybody, anybody open to business, we don’t restrict ourselves to one entity”. Besides, the EU offer is not necessarily always the most attractive, given the too-often slow pace of delivery and the frequently higher price tag. That may change moving forward if the EU manages to deliver on its promises (see section ‘Adjusting the toolbox’ below), but at present the EU should focus on selling its own product rather than pointing to the (perceived) defects in the product of its competitor.

There are enough elements to draw up a positive European offer, but more than this, the European offer needs to be closely aligned with the actual needs and wishes of partner countries. This means that European politicians and policymakers should tailor their messaging to the local context, alongside their actual support (see section ‘Adjusting the approach to partners’ below).

## **Adjusting the policy direction (further)**

The most important dimension of the Global Gateway is the shift that it can help to bring about in the foreign, economic and development policy of the EU and its member states ([Bilal 2023](#); [Teevan 2023](#); [Teevan et al. 2023](#)). There is a growing awareness across Europe that ‘business as usual’ is no longer possible; that development cooperation cannot be considered in isolation from wider foreign, economic and security policy concerns; that partners in the developing and emerging economies want more investment alongside traditional development aid and that they prefer for the EU to be open about its own interests. Yet, delivering on this change in policy direction across the EU institutions and member states is a slow process. Indeed, few member states have yet taken a strategic approach to the Global Gateway, while the EU institutions remain ill-equipped in many ways.

EU member states are key to delivering on the Global Gateway. They have at various points expressed their support for the Global Gateway at the Foreign Affairs Council (notably [CoEU 2021](#), but also in [CoEU 2023](#) on digital diplomacy) and General Affairs Council (for example, [CoEU 2022](#) on export credits), meaning that the strategy has been approved at the highest levels. Yet, the actual participation of European leaders and foreign ministers at the recent Global Gateway Forum was disappointing, with the notable absence of senior ministers from big states like France and Germany. We are also not yet seeing European member state leaders truly embracing and promoting the Global Gateway to a sufficient extent in their bilateral relations. For example, while Germany's recent meeting on the G20 Compact with Africa Conference aligned closely with the Global Gateway in its focus on private sector investments, the materials around the event do not mention the Global Gateway ([Bundesregierung 2023](#); [Scholz 2023](#)). The EU is the sum of its member states and thus their political buy-in is needed if the Global Gateway is to truly take off. If all 27 member states begin to invoke the Global Gateway in their conversations with partner countries, that will make the strategy far more powerful and can truly begin to make a difference at the political level. This would show partner countries that the EU is really serious about this and truly plans to deliver.

Furthermore, many member states have been very slow to engage with the Global Gateway and to consider both what they can contribute and what it can deliver for them. While there is a growing sense at the Foreign Affairs Council that the EU and its members need to integrate their interests into their approach to development policy, many member states struggle with how to do this in practice. This is particularly true for certain newer areas, such as [on digital connectivity](#), where despite the creation of the Digital for Development Hub, it has been difficult to agree on and jointly finance bigger strategic projects. Many officials find it difficult to reconcile a greater focus on self-interest with a more traditional development approach and fear that the Sustainable Development Goals (SDGs) are not being sufficiently considered in the Global Gateway. More work will need to be done both by member states and by the European Commission to develop a coherent foreign and development policy that balances self-interest and development goals (ECDPM is currently working on this). This in turn will need to be reflected in shifts in the approach to development cooperation at the level of member states.

At the same time, by further developing the governance structures of the Global Gateway, the European Commission can also help to build greater trust and buy-in by member states, the European Parliament and other stakeholders. The governance structure is already evolving. The second meeting of the Global Gateway Board, bringing together the foreign ministers of member states, as well as the European Parliament as an advisor, is due to take place in December. It will review the second year of the Global Gateway, should provide strategic guidance moving forward and approve a list of flagships for 2024. This year saw the foundation of the Global Gateway [Business Advisory Group](#) and the [Civil Society and Local Authorities Dialogue Platform](#).

However, more is needed to ensure that stakeholders have a sense of ownership in the strategy. There is a need to further improve the transparency, openness and accountability of the Global Gateway. This means moving beyond the closed-door high-level forum format and engaging in regular and open dialogues with all parties to the Global Gateway. This should mean not only including high-level policymakers in such events but also practitioners, public financial and development institutions (including development finance institutions (DFIs), public development banks (PDBs), implementing development agencies, export credit agencies, investment promotion agencies and trade policy organisations), broader civil society and experts (including academics and think tankers), in the EU and in partner countries (for example, [Counter Balance and Eurodad 2023](#); [Karaki and Bilal 2023](#); [Palmowski 2023](#); [Practitioner's Network 2023](#)). There is also a need to increase the coherence and complementarity of the increasingly complex governance and decision-making frameworks of the EU external action and finance, including within the Council (between the various preparatory bodies), with the EU aid and development finance governance bodies and regulation, with the European Parliament and with Team Europe coordination mechanisms.

The European Commission will also need to continue to make other adjustments to bring about the kinds of changes that it aims to achieve. This will need to start from an increasingly integrated approach between the EU institutions and the European External Action Service (EEAS), with real and concerted coordination around the Global Gateway. It will also require hiring a lot more people with

knowledge of external investments and how the private sector works. Perhaps most importantly, it will need to empower EU delegations in partner countries to develop truly meaningful approaches to engaging with partners, and it will need to make its tools and instruments work to deliver on the Global Gateway.

## **Adjusting the approach to partners**

The Global Gateway started as quite a top-down strategy that was developed and imposed by Headquarters. EU and member state delegations on the ground were in many cases little involved in developing the bigger projects that have been announced as part of the Global Gateway, while in-depth consultation with partner countries appears to have been shallow if it has taken place at all.

Of course, it is normal that this kind of geopolitical strategy should be developed in Brussels and that not every stakeholder can be involved from the beginning. Yet this approach will need to change if the Global Gateway is to have staying power, with planning increasingly happening on the ground in partner countries.

Thus far, there has been a focus on building momentum through speedy announcements and developing lists of flagship projects. However, actually delivering on these announcements is going to require bringing multiple stakeholders along. This is notably true for some of the [strategic corridors](#) and regional backbones that the EU is keen to develop in [Africa](#) and other parts of the world. Developing these corridors will depend on the interaction of a range of [political, economic and technical factors](#) on the ground, and it will be vital that EU delegations develop meaningful dialogues with partners within and between countries if there is to be any hope of delivering. Furthermore, given that some of the most visible announcements are closely linked to critical raw materials (for example, the [Lobito Corridor](#), which is due to connect southern DRC and northern Zambia to the Port of Lobito in Angola), it is essential that the EU properly take account of wider ambitions relating to value-addition and job creation to avoid being seen as resurrecting an extractive economic model that runs counter to partner countries' ambitions.

EU delegations and member state embassies have in many cases worked closely together in planning country-level Team Europe initiatives. Yet, due to the way that regional programmes are planned within the European Commission and development banks, major regional infrastructure projects – including transport corridors, regional fibre optic cables and regional energy projects– that should complement these TEIs, are being planned in Europe. Given how complicated the dynamics can be on the ground in partner countries, let alone between neighbouring countries, it is vital that technical assessments by development banks are complemented by strong context understanding and political economy analysis by the EU and its partners.

## Adjusting the toolbox

Despite some positive developments, the range of tools that the EU has at its disposal is not yet sufficient to match all the ambitions of the Global Gateway in very diverse countries and across different areas of cooperation. The adequacy and efficiency of tools should also be carefully reconsidered to target the EU's Global Gateway objectives.

As part of the EU's external financing instrument, the Neighbourhood, Development and International Cooperation Instrument (NDICI - Global Europe), the guarantees and blended finance under the European Fund for Sustainable Development Plus (EFSD+) could play a crucial role in attracting essential European investments in line with the goals of the Global Gateway, particularly in Africa. The EFSD+ aims to help mobilise public and private finance at scale to address the growing annual financing gap for the SDGs that has been exacerbated by [multiple crises](#). The EU aims to mobilise close to half the targeted €300 billion investments under the Global Gateway via the EFSD+. It should help enhance the cooperation and coherence between the work of multiple European DFIs and PDBs, donors and implementing agencies, alongside collaboration with international and local finance and development actors.

Yet, the EFSD+, and its 2017 predecessor EFSD, have been slow to be put in place and implemented. The linkages between Global Gateway flagship projects and

proposed investment programmes by DFIs and PDBs under the EFSD+ are often not clearly articulated. Further, the EFSD+ and proposed programmes may not respond to the needs and faster operational timeframe of the private actors they aim to mobilise. In seeking to mobilise finance at scale to reach the promised €300 billion investments, not enough attention is given to achieving the SDGs, in particular in poorer and more complex fragile and vulnerable contexts, and to the additionality of the funding mobilised. The balance between strategic steering and operational flexibility also needs to be found, with a more dedicated focus on implementation. Coordination and complementarity between development finance, technical assistance and policy reforms should be further emphasised, as articulated in the EU External Investment Plan. This truly requires a Team Europe approach, with a range of actors from EU institutions and member states, and their agencies and financial institutions, involved ([Karaki and Bilal 2023](#); [Practitioner's Network 2023](#)). Most of all, it requires strong ownership and appropriation in partner countries, including in terms of synergies and complementarity between European approaches and tools with partner countries' own initiatives, mechanisms and ecosystems.

Another important dimension is the interaction between development instruments and public support to the European private sector. The NDICI – Global Europe and the EFSD+ are tied to achieving development goals, mainly with official development assistance (ODA). While development cooperation and finance can benefit European private actors, EU aid is not meant to support the [European private sector's interests](#). To better engage and mobilise European private companies and financiers, the EU member states will have to more effectively mobilise their trade and investment promotion institutions for achieving Global Gateway objectives, in complementarity with development tools. At the EU level, there are no proper mechanisms yet in place to facilitate the involvement of EU member state trade and investment institutions. The strategic reflection and operationalisation of an EU export credit 'facility', and its complementarity with European development finance, should be further prioritised if the Global Gateway is to lead to transformative shifts in EU external strategic investments along the SDGs ([Bilal 2022](#); [Große-Puppendahl et al. 2016](#); [Mudde et al. 2023](#); [Schlögl et al. 2023](#)).

## Implementing EU strategic ambitions

European policymakers are very concerned with China's role in the world, and its influence in third countries. Yet countering that means moving from rhetoric to delivering on policy changes and the rollout of European investments and infrastructure on the ground. This means shifting the narrative to a more meaningful engagement with partners, stepping up the approach to development cooperation both at the EU and member state level, empowering EU delegations and EU member states' diplomats, development actors and business representatives to play a more meaningful role in delivering on the Global Gateway aspirations in partnership with third countries, and stepping up efforts to ensure that the EU has the necessary financial and trade instruments to deliver on the Global Gateway.

Practically, this means:

1. EU political leadership should embrace a narrative based less on China bashing and more on dialogue with partner countries. Partner countries have made clear time and again that they are not interested in being lectured. Part of the narrative that China sold was that it did not lecture or use conditionality and that it respected the right of each country to set its own agenda. Whether or not one believes China did this effectively, it was a convincing narrative for many countries around the world. The EU now needs to be careful that it doesn't fall into the trap of repeating past mistakes.
2. The EU and its member states need to decide if they are serious about changing the way they approach development cooperation as part of a more strategic and integrated approach to foreign policy as a whole. Officials in partner countries repeatedly welcome the turn towards a clearer elaboration of EU interests as part of its cooperation policy. Member states need to think holistically about how they approach their own wider external action (including foreign, security, trade, investment and development policy), and clearly elaborate their own approaches to the Global Gateway, making sure that development agencies and development banks are empowered to follow through on these changes,

and better cooperate with each other, and with other development and private actors.

3. The European Commission needs to make further changes to similarly ensure that it can deliver on the Global Gateway, including through hiring an array of qualified professionals with the necessary skills to deliver. A particular focus should be on increasing staffing at EU delegations around the world so that they can play a key role in developing the Global Gateway through meaningful consultation with partner countries. At present, many delegations have too few people working on key strategic areas, including green, digital and private sector engagement. Hiring qualified professionals to lead engagement with local stakeholders on these topics will be essential to developing necessary in-country expertise, building local ownership and developing necessary alliances to deliver on the Global Gateway in practice. This will be essential for cross-border regional corridors that will rely on an understanding of political economy dynamics on either side of given borders.
4. The EU should continue to foster its efforts towards a true Team Europe approach, more effectively and speedily coordinating the cooperation and complementarity between actors. These include; multilateral development banks (MDBs), including the European Investment Bank (EIB) and its external branch EIB Global, and the European Bank for Reconstruction and Development (EBRD); DFIs under the umbrella of EDFI, the Association of European DFIs; PDBs under the umbrella of JEFIC, Joint European Financiers for International Cooperation; implementing agencies under the umbrella of the Practitioners' Network for European Development Cooperation and donors engagement. This should be combined with other trade and investment promotion tools and institutions, so as to accompany the European private sector in external investments as part of the Global Gateway, including an ECA 'facility' (institutional framework or coordination mechanism) and a more structured complementarity between ECAs and DFIs.
5. The EU should encourage and facilitate the innovative approaches, modalities and instruments of its public and private (financial) actors, while further pursuing an open, transparent and inclusive approach at the EU and its member states levels, as well as in partner countries and international (in particular G7) fora.

6. The European Commission and the EU member states should increase the speed at which they roll out their financial instruments to mobilise investments, reducing administrative burdens while ensuring a strong focus on SDG, climate and inclusiveness impact, in particular in more vulnerable and fragile countries.

The Global Gateway is far from perfect and a lot remains unclear even to those who are supposed to defend it in EU delegations, member states and the European Parliament. However, this should not be an excuse for any part of Team Europe to proceed with business as usual, stay passive or give up on the aspirations of the Global Gateway before it has really been given a chance. Different players within the European Commission, the member states, the European development banks and other European institutions and agencies all have a role to play in trying to ensure that the Global Gateway does actually live up to its potential. They will notably need to make sure that the partners they are engaging with across the world feel that Team Europe has a genuinely interesting offer that meets their needs and interests.

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