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## Global Gateway's proof of concept EU digital connectivity in Africa

Global Gateway constitutes the EU's third attempt to reconfigure its strategy and tactics in a world of clashing capitalisms and geopolitical power shifts. Complementing the new industrial policy that protects the EU's interests at home, Global Gateway is Europe's international agenda to promote individual freedom, political liberty and economic openness globally, together with partners that share its interests. The proof of concept is in the EU–Africa context and in the digital domain, where key EU interests and niches lie in terms of development, norms and standards, and stability. Global Gateway action here can draw on lessons from earlier experiences in the Indo-Pacific. A Team Europe approach that creates ownership by EU institutions, member states and the private sector is needed to kick-start flagship projects that respond to real needs. Much is at stake. A positive narrative that highlights alternative opportunities – to growing Chinese influence, in particular – is the most effective way of positioning the EU in a region where growth, security and stability are key interests of both the EU and its member states.

### Introduction

The EU's new Global Gateway strategy, which was unveiled on 1 December 2021, constitutes Europe's third attempt to reposition itself in a world of clashing capitalisms and geopolitical power shifts. First coined by European Commission President Ursula von der Leyen in her September 2021 State of the Union speech, the full-fledged strategy<sup>1</sup> follows on from the 2018 EU–Asia Connectivity Agenda and the push for European economic diplomacy that started in 2015. Third time is the charm, they say. But will it be, in this case?

In EU policy circles it has been argued that Global Gateway's proof of concept is in the EU–Africa context. A regional focus on Africa is in the EU's interests, as stability and resilience in its backyard are crucial for the EU itself. The relationship is currently not in good shape, with mistrust prevailing in African countries about EU institutions and EU member states resorting to paternalistic attitudes and placing their own interests up front instead of searching for common ground. The EU–Africa Summit has been postponed several times and Chinese propositions are now considered a good alternative in Africa to traditional European development cooperation or investments. Nevertheless, the EU remains the main trading partner and largest investor in the African continent and

<sup>1</sup> [The Global Gateway](#), European Commission and European External Action Service, 1 December 2021.

finding common ground would be beneficial for both regions.<sup>2</sup>

The digital domain is the first-mentioned thematic priority in the Global Gateway strategy and hence another crucial test of its success. Digital technologies are a key enabler of economic development, as they assist individuals to reap the benefits of the disruptive digital transition – for example by facilitating broadband access, providing access to bank accounts, and introducing digital tools to gain higher yields from agricultural land or to improve governance.<sup>3</sup> The digital domain is also a field where possibilities for surveillance and data exploitation are increasingly undermining democratic values. Set against a context of rising digital authoritarianism, EU–Africa cooperation on the digital transition will benefit both sides, especially now that almost all African countries have proposed or incorporated digital agendas.<sup>4</sup> With its outreach, the EU supports the autonomy and strategic choices of governments in Africa, characterized by the EU’s liberal norms such as openness, transparency and privacy in the digital domain, and thus offering an alternative to the Chinese presence.

This Clingendael Policy Brief reflects on the past, present and future of Europe’s connectivity action, and discusses why a focus on EU–Africa digital connectivity is warranted and what are the crucial steps towards implementation of this agenda.<sup>5</sup> The forthcoming EU–Africa summit of February 2022 will be a test of Global Gateway’s appeal for third countries, its ownership by key European stakeholders and, crucially, its ability to promote Europe’s interests internationally.

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2 [‘A Comprehensive EU strategy for Africa: trade and investments’](#), European Parliament, June 2020.

3 Edna Maeyen Solomon and Aaron van Klyton, [The impact of digital technology usage on economic growth in Africa](#), August 2020.

4 [‘What is Africa’s Digital Agenda?’](#), Africa Policy Research Institute (APRI), September 23, 2021.

5 While the digital and green transitions run in parallel and are in many ways interlinked, detailed discussion of building low carbon economies and climate resilient societies is beyond the scope of this paper.

## Playing offensive: Europe’s proposition

A wind of change has been blowing through Brussels and EU national capitals in the last two years, as Brussels pushed for new instruments to strengthen Europe’s economic resilience. Industrial policy is no longer taboo, and defensive tools to protect against ‘systemic rivalry’ – with China, in particular – have been created or are in the making. These tools range from investment screening, 5G telecommunications and export controls to the anti-coercion instrument and secure supply chains.<sup>6</sup>

Global Gateway adds to this EU defensive toolkit: an offensive ‘promote’ agenda that supports individual freedom, political liberty and economic openness globally. The positive narrative of Global Gateway that highlights alternative opportunities – to growing Chinese presence, in particular – is likely to be the more effective way of positioning the EU in shifting relationships. This response is preferred over an alarmist response that fails to recognize the motivations of those actors to engage with Chinese initiatives.<sup>7</sup> As such, Global Gateway serves the EU’s medium and long-term interests: bolstering growth and augmenting the interoperability and compatibility between European and other economies, and ensuring that European norms continue to underpin global economic, political and security orders on land, at sea and in the digital space. Against a backdrop of rising Chinese influence – most recently, a pledge to ramp up digital cooperation and investments in Africa<sup>8</sup> – and hardening Sino–US competition, it is by no means a given that these spaces remain open, rules-based and primarily serve the interests of the people rather than those of the state or big business.

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6 European Commission, ‘European Industrial Strategy’, European Commission, n.d.; and European Commission, ‘EU strengthens protection against economic coercion’, European Commission, 8 December 2021.

7 Jos Meester, [‘Designed in Ethiopia’ and ‘Made in China’](#), Clingendael Institute, February 2021.

8 [South China Morning Post](#), 25 August 2021.

The new initiative fulfils at least one key requirement for success that was lacking in the earlier push for European economic diplomacy and the 2018 EU-Asia Connectivity Strategy<sup>9</sup>: it has the backing of EU political leadership at the highest level. Leaders in EU capitals now need to throw their weight behind it – as the German and French ambassadors to the EU did in the run-up to the Global Gateway communication.<sup>10</sup> Political leaders must be consistent in their narrative and kick-start flagship projects that cater to high standards of good governance and transparency in Global Gateway's priority areas: digitalization, health, climate and energy, and transport sectors, as well as education and research.

Global Gateway's investment plan reflects this push for concrete action, which distinguishes it fundamentally from its predecessor, the 2018 Connectivity Strategy. That strategy merely offered some perspectives for supporting private investment in connectivity-related projects, while Global Gateway details coordination of how complementary funds within the EU may be leveraged. The oft-cited 300 billion euros in public and private funds that Global Gateway is to invest by 2027 relies on both public and private commitment to the initiative. While oversight and steering from the highest political level will provide the necessary push, the initiative must be decentralized, encouraging practical initiatives from the bottom-up. Ultimately, top-level coordination must be firm but light, seeking to create ownership and a sense of common purpose among European stakeholders that is required for decentralized but coordinated action.

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9 Maaïke Okano-Heijmans, ['Who is Afraid of European Economic Diplomacy?'](#), Clingendael Institute, 5 April 2016; and ['Connecting Europe and Asia: the EU strategy'](#), European External Action Service, 26 September 2019.

10 Miguel Berger, ['Why connectivity can strengthen European sovereignty'](#), European Council on Foreign Relations, 2 December 2021.

## Building ownership of the EU, member states, the private sector and banks

In its Global Gateway engagement with Africa, both sides stand to benefit from the so-called Team Europe approach that is also taking shape in the Indo-Pacific. For example, contributing to EU-ASEAN cybersecurity cooperation, member states have started cyber-policy dialogues with specific countries, such as those between the Netherlands and Indonesia and the Netherlands and Singapore. Projects will gain legitimacy, ownership and visibility if they are delivered in a coordinated manner by various European stakeholders, including EU institutions, EU member states and their financial institutions, and the European private sector.

Comprehensive action is important, as China is continuing to invest in Africa's digital infrastructure and connectivity, particularly in remote areas, getting more people online and creating markets for its high-tech companies. Chinese companies offer competitive products in cloud computing, artificial intelligence and digital financial technology (FinTech) solutions such as e-payments. Along the way, they enhance interoperability and compatibility not only with other Chinese technology and equipment, but also with Chinese norms and standards, which infringe on local governments' digital sovereignty and users' data sovereignty.

Global Gateway embodies Europe's proposition as an alternative to the digital authoritarianism that is growing worldwide – as well as to the surveillance capitalism of (also US) Big Tech more broadly. The global presence of European businesses is thus required if the EU is to be a leading player in the digital economy and respected as a referee with human-centred approaches.

## Europe's backyard: focus on Africa

A new EU-Africa partnership is still being defined, almost two years after the European Commission proposed a new Strategy with

Africa in March 2020.<sup>11</sup> With the Chinese government's ever-increasing interest in the African continent, 2022 will be a pivotal year for the EU to engage with it in a practical and mutually beneficial manner. The EU seeks to forge a more equal partnership, with the close involvement of the private sector and civil society.

The aim is to work with African countries as they go through three revolutions: the industrial revolution; the push for green growth and sustainable energy; and the digital transformation. Important steps towards cooperation are being made in each of these fields and the EU is prioritizing Africa in its Digital4Development policy.<sup>12</sup> Two concrete examples of digital cooperation that are considered mutually beneficial are the exchanges facilitated by the Tunga platform and the *Digital Explorers* programme. The Tunga platform matches African information and communications technology (ICT) developers from Uganda, Nigeria and Egypt with Western companies that deal with ICT employee shortages. Another example is cooperation between the Lithuanian and Nigerian ICT sectors in the *Digital Explorers programme* to enhance both countries' ICT markets through exchange programmes.<sup>13</sup> Yet, concrete actions of this sort in the digital domain are still few. Much more needs to be done, and public debate in Europe about the opportunities and challenges of African digital development for Europe remains scarce.

To support EU–Africa relations and the green and digital transitions, the EU has pledged in Global Gateway to mobilize €2.4 billion in grants for sub-Saharan Africa and €1.08 billion for North Africa to support investments in flagship projects on, for example, renewable energy such as hydrogen.<sup>14</sup> This complements the €29.18 billion for sub-Saharan Africa from the Neighbourhood, Development and International Cooperation Instrument (NDICI), which is now the main instrument to finance the EU's external action.<sup>15</sup>

Global Gateway will be a test of whether Europe can live up to its ambition to offer attractive European opportunities for sustainable development and strategic resilience. The initiative must be more than 'a vision on paper' – to quote the indirect but hardly veiled criticism of a Chinese government official before the strategy had even been published.<sup>16</sup> Countries in Africa will be looking for concrete, tangible opportunities – for example on investment, trade, vaccines, and digital skills and training centres – in genuine partnerships rather than based on development assistance.

### Europe's niche: digital

The digital domain is a key investment priority of Global Gateway, and the EU can draw on its recent experience in the Indo-Pacific as it builds its partnership with Africa for digital connectivity.<sup>17</sup> Vast differences between the two regions notwithstanding, two similarities stand out: the EU is a key trading partner, investor and assistance provider both in

11 Giovanni Carbone, ['Europe and Africa: the long search for common ground'](#), Italian Institute for International Political Studies, 15 November 2021.

12 European Commission, ['State of the Union 2018: towards a new "AfricaEurope Alliance" to deepen economic relations and boost investment and jobs'](#), European Commission, 12 September 2018; and ['Africa–Europe Alliance: first projects kicked off just three months after launch'](#), European Commission, 18 December 2018; ['France, Germany, UK, US and EU launch ground-breaking international just energy transition partnership with South Africa'](#), European Commission, 2 November 2021; and 'Team Europe: Digital4Development Hub launched to help shape a fair digital future across the globe', European Commission, 8 December 2020.

13 Monika Sie Dhian Ho *et al.*, ['Gedeeld belang bij circulaire migratie: naar duurzame partnerschappen'](#), Clingendael Institute, June 2021.

14 [The Global Gateway](#), European Commission and European External Action Service, 1 December 2021.

15 ['European Commission welcomes the endorsement of the new €79.5 billion NDICI–Global Europe instrument to support EU's external action'](#), European Commission, 19 March 2021.

16 Stuart Lau, [POLITICO China Direct: 'Don't sanction the Taliban' – Merkel's Beijing pick – Lithuania goes Aussie](#), *POLITICO*, 26 August 2021.

17 For this the authors draw on Maaïke Okano-Heijmans, Karthik Nachiappan and Brigitte Dekker, ['Fostering digital connectivity in and with the Indo-Pacific: opportunities for the EU'](#), European External Action Service, 19 April 2021.

Africa and the Indo-Pacific; and governments in both regions are struggling to reap the opportunities offered by the digital transition, while maintaining autonomy and resilience.

Africa has a staggering digital divide, with less than 25 per cent of its people using fixed or mobile broadband internet, even though this is available to 70 per cent of the African continent's population.<sup>18</sup> The EU can work to bridge this digital divide through digital connectivity actions that encourage inclusive, human-centred development, including through investments in internet and mobile usage, and capacity and skills-building programmes.<sup>19</sup> As the case of Cambodia in the Indo-Pacific shows,<sup>20</sup> also governments of less-developed countries are likely to welcome investments in infrastructure that underpin the e-economy and to learn from European experiences with complementary digital regulations, skills and institutions.

The Global Gateway strategy proposes several important steps that bolster European propositions in developing the African countries' digital economy and strengthening digital governance and resilience. These include digital economy packages that aim to 'combine EU infrastructure investments with country-level assistance to ensure the protection of personal data, cybersecurity and the right to privacy, trustworthy AI, as well as fair and open digital markets'.<sup>21</sup> These propositions complement already existing efforts such as the African-European Digital Innovation Bridge (AEDIB) and the AfriConEU, which facilitate and support Digital Innovation Hubs in Africa.<sup>22</sup> The 2019 African Union-European Union (AU-EU) Digital Economy Task Force, resulting in the EU-AU Partnership on the Digital

Transformation and the EU-AU Data Flagship to design a framework to govern industrial data will also be important vehicles for EU-Africa cooperation.<sup>23</sup>

## Enhancing EU-Africa cooperation

The EU's experiences in the Indo-Pacific region offer further guidance for the implementation of EU-Africa digital cooperation.<sup>24</sup> Best practices are evident in three interrelated fields: (1) establishing regular dialogues with governments, the private sector and civil society on practical steps required for an inclusive digital transition; (2) encouraging investments in the digital economy, especially the telecommunications sector and digital finance sectors; and (3) improving the regulatory framework in each jurisdiction and between them, including by way of digital economy agreements.

### Dialogues with government, civil society and the private sector

The first point concerns the added value for both sides of dialogues on governance of the digital domain at home. Such dialogues are now starting with Indo-Pacific governments, and include the EU-ASEAN and EU-Taiwan Dialogues on the Digital Economy. Through these dialogues, regulators wish to strengthen governance of the digital domain within their own jurisdiction, in fields including data protection, taxation of Big Tech, fair competition, finance, and secure networks.

The choices of Indo-Pacific countries will not always be identical to Europe's digital governance approach, as local circumstances differ – including the level of digital development, market power and digital inclusion. Yet if experience from engagement with countries in the Indo-Pacific is any guide, African governments will

18 [Narrowing the digital divide can foster inclusion and increase jobs](#), World Bank, 24 September 2021.

19 ['Promoting open and inclusive connectivity: the case for digital development cooperation'](#), *Research in Globalization*, August 2021.

20 This is detailed in a forthcoming Clingendael Policy Brief on EU-ASEAN digital connectivity (January 2022).

21 [The Global Gateway](#), European Commission and European External Action Service, 1 December 2021.

22 [The Project – AfriConEU and Flagship: African-European Digital Innovation Bridge \(AEDIB\)](#), *Futurium* (europa.eu).

23 Chloe Teevan, ['Building strategic European digital cooperation with Africa'](#), *ECDPM Brief*, European Centre for Development Policy Management (ECDPM), September 2021.

24 Beyond the Indo-Pacific Strategy of September 2021, this is also drawing on experience from the 2018 Connectivity Strategy, the Connectivity partnerships with Japan and India.

be eager to draw inspiration from Europe's human-centred approach, which emphasizes openness, transparency and the digital rights of consumers. The AU-EU Digital for Development (D4D) Hub project, initiated in November 2021, is an important first step in this regard: supporting African institutions to lay the groundwork for an inclusive digital transformation; and promoting collaboration between stakeholders on the two continents to create an enabling environment that seizes digitalization opportunities for development.<sup>25</sup>

### Investments in hard and soft infrastructures

As well as more government and stakeholder dialogues, the EU should support investments in broadband networks in Africa through cooperation involving EU institutions, EU member states and their financial institutions and the European private sector. This cross-institutional cooperation, now called the Team Europe approach, can encourage European businesses to reap e-commerce opportunities that spring from these investments.

Telecommunications infrastructure (including digital backbones, undersea cables and satellite coverage) is key to bringing more people online and will promote financial inclusion thanks to digital financial technologies (FinTech). Limited broadband and mobile penetration and uptake hinder the embrace of advanced digital technologies such as big data, the Internet of Things and artificial intelligence, which are increasingly important for sustainable and green (digital) economies.

One lesson that can be drawn from experience in the Indo-Pacific is that new governance mechanisms are needed to help to absorb broadband and mobile connectivity costs and to widen internet connectivity. Public-private partnerships are one tool for this, and private financing could also be leveraged given the business potentials for investing in hard and soft digital infrastructures. In addition, lessons

from the Indo-Pacific show that roll-out of the necessary infrastructure alone is not enough. Capacity-building and training programmes to elevate digital skills are required to bridge the gap between access to telecommunications infrastructure and using this infrastructure to participate actively in the e-economy.

FinTech is an upcoming sector that will only grow in importance in the coming years. As in the Indo-Pacific, it has served millions of unbanked people in Africa. 1.7 billion mobile money transactions stem from this region, accounting for almost 70 per cent of global mobile money transactions in 2018.<sup>26</sup> In the Indo-Pacific, India has had remarkable success with its efforts to enhance digital financial inclusion through digital payment systems. Trilateral cooperation with Indian companies with a proven track record could facilitate improved access to countries, particularly in Africa. European players can assist with access to financing and business scaling of African FinTech firms, and with the creation of an African digital market that would help to overcome the challenges stemming from the fact that Africa's digital payment systems are now highly fragmented because of FinTech's geographic concentration in Nigeria, Kenya and South Africa.<sup>27</sup>

Cooperation and synergies formed by the efforts of the EU as the world's main regulatory power, India's track record and experience, and Africa as one of the frontrunners in FinTech adoption can provide a strong push towards a human-centred approach to FinTech and financial inclusion. FinTech can demonstrate the benefits of digital identities, data portability and the new trend towards decentralized finance at a grassroots level. Strengthening such soft infrastructure will contribute to countries' strategic autonomy and resilience in the digital domain.<sup>28</sup>

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25 European Commission, '[AU-EU D4D Hub: shaping a joint digital future](#)', European Commission, 29 November 2021.

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26 Leo Holtz, '[Mobile money dominates FinTech investments in Africa](#)', *Brookings*, 30 September 2021.

27 Ibid.

28 This is detailed in a forthcoming Clingendael Policy Brief on the geopolitics of FinTech and data governance (December 2021).

## Improving regulatory frameworks

A third lesson from the EU's engagement with the Indo-Pacific for its relations with Africa is that both sides stand to benefit from appropriate and interoperable regulatory frameworks and data-sharing mechanisms – both at home and in the international setting. The EU is strong in data governance, with the General Data Protection Regulation (GDPR) as its most successful endeavour to date in creating a truly human-centred data-protection mechanism,<sup>29</sup> and with a Digital Services Act (DSA) and Digital Markets Act (DMA) soon underway.<sup>30</sup> Also, the Single Euro Payments Area (SEPA) can be an example for groups of African countries – as it is for Southeast Asian countries – to leverage opportunities and improve cross-border payments. The EU is now contemplating its engagement with digital partnership agreements and e-commerce agreements that are (being) established in the Indo-Pacific, and it would do well to engage in such talks with African countries as well.

Overall, the aim of working with African countries on domestic and interregional regulatory frameworks is to ensure that domestic laws do not constrain or stymie data-sharing between the European and African countries' jurisdictions. For the EU, interregional regulatory frameworks are an important instrument for advancing the vision of an open, balanced and inclusive digital architecture. Drawing from lessons in the Indo-Pacific, constructive dialogues – even if the focus or approaches differ – are needed to ensure interoperability and compatibility of the digital markets, data-governance frameworks and technology networks.

## Conclusion

Global Gateway must prove Europe's worth as a global leader with attractive opportunities for economic development and resilience through projects that cater to public well-being. The new level of energy and commitment from Europe's highest political level is aligning EU institutions in a way not seen before, and a newfound Team Europe approach should enhance coordination with EU member states and stakeholders in the private sector, financial institutions and civil society.

EU–Africa relations will be a key test of Global Gateway's ambitions. As the two continents are defining a new partnership, and both seek to manage the disruptive technological transition, delivering on digital connectivity is crucial. This ranges from hard telecommunications infrastructure and investments in the e-economy, to support for technological solutions for countries' green transition and digital capacity-building.

The EU's recent re-engagement with the Indo-Pacific offers valuable lessons for the new partnership with Africa. It shows that opportunities lie in the establishment of government and stakeholder dialogues, in encouraging investments in the digital economy, and in improving regulatory frameworks and cross-border data flows. Like in the Indo-Pacific, the EU and its member states will have to adjust to local circumstances. This is bound to lead to diverging approaches and differing objectives of local governments. Working with the private sector and civil society as trusted intermediaries can help in identifying and addressing these differences. EU delegations must step up their role as an intermediary between the needs of European and African civil society, the private sector and governments.

Much is at stake. Enhanced European action can assist countries that seek to benefit from the opportunities offered by the digital transition and simultaneously improve European economic competitiveness. In addition, it can help countries to manage the societal impact of disruptive technologies, while maintaining digital sovereignty and resilience. Global Gateway must deliver on these fronts, and its proof of concept is in EU–Africa relations.

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29 De Technoloog, 'Herbert Blanckesteijn en Ben van der Burg', *BNR Nieuwsradio*, <https://www.bnr.nl/podcast/de-technoloog>.

30 Put simply, the DSA sets out to tackle disinformation while seeking to uphold and protect freedom of speech, while the DMA seeks to avoid monopolies and to promote market fairness, balanced with innovation.

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Clingendael – the Netherlands Institute of International Relations – is a leading think tank and academy on international affairs. Through our analyses, training and public debate we aim to inspire and equip governments, businesses, and civil society in order to contribute to a secure, sustainable and just world.

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