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Policy Brief

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Connecting the Dots: Linking Digital Global Gateway to local sector-specific needs

The European Union's Global Gateway initiative is at a pivotal moment, with calls for scaling its impact and refining offers to global partners. The Global Gateway's Digital pillar remains underdeveloped, with only six of 46 flagship projects for 2025 focused on digital (hard) infrastructure. Leveraging EU Member States' expertise, particularly from digital leaders like the Netherlands, offers a path to strengthen this pillar and meet global partner needs more effectively. The Netherlands brings significant digital capabilities in HealthTech, EdTech, Semiconductors and Logistics, complementing offers in AgriTech, Cybersecurity, and FinTech and Data Centres. Looking at three countries – Indonesia, South Africa and India – the necessity of tailoring the EU's approach to specific local contexts and demands is crucial. Indonesia prioritises cost-effective solutions, which cannot always be met by European offers. South Africa's clear preference for Chinese propositions is a challenge for enhanced digital engagement with Europe. Meanwhile India's efforts to de-risk from China in the digital domain offer optimistic prospects for collaboration. To succeed, Global Gateway projects must moreover deliver on transparency and private-sector engagement, while also mobilising Member State contributions and positioning the EU as a trusted global partner.

Introduction

In her September 2024 Mission Letter to the new European Commissioner for International Partnerships, European Commission President Ursula von der Leyen asks Joseph Síkela to 'take Global Gateway from startup to scale-up'.[1] This is a call to broaden the EU's investment programme and to ensure its continuity past its first investment cycle, from 2012–2027. Von der Leyen also asks Síkela to 'refine and accelerate the offer the EU makes to its partners'. If the Digital pillar of Global Gateway[2] is to be successful, this endeavour should follow two critical conditions: expanding its focus beyond hard infrastructure and development; and taking full advantage of the sector-specific digital strengths of EU Member States. However, the list of Global Gateway flagship projects for 2025 does not yet reflect these conditions. All six

1 Ursula von der Leyen, *Mission Letter for Jozef Síkela, Commissioner-designate for International Partnerships*, 17 September 2024.

2 The other four Global Gateway pillars are Climate and Energy, Transport, Health, and Education and Research. See: European Commission, *Global Gateway Overview*.

Table 1 Summary of Global Gateway flagship projects announced under the Digital pillar for 2025

Partner Country/Region	Project Title
Malaysia	Expansion of SiC (Silicon Carbide) Power Fab to the world's largest 200mm semiconductor production plant
Oceania	Boosting digital connectivity in the Pacific
Djibouti; Ethiopia; Somalia; Tanzania; Kenya; India–Eastern Africa	EU–Africa–India Digital Corridor
Africa	Africa–EU space partnership programme
Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia	WiFi4WB WiFi initiative for Western Balkans
Somalia–Eastern Africa	Somalia Connectivity Expansion

Source: authors' compilation based on Council of the European Union, Global Gateway: Council endorses flagship project list for 2025, 2 December 2024.

forecasted projects in the digital domain – out of a list of 46 – focus solely on hard infrastructure, as Table 1 shows.[3] For a programme that sets out to address the twin Green and Digital transitions, this falls short of expectations for delivering on Global Gateway's Digital pillar.

One of the main challenges of large infrastructure projects, whether in the transport, energy or digital domain, is that they transcend the capabilities of individual EU Member States. Such projects are of a size and scope that few Member States have and thus demand great coordination and alignment with the private sector, financial institutions and the partner country. Many Member States are, however, ready to deliver on other quick(er) wins. To be recognised as a trusted partner that can actively and concretely contribute to partners' progress, the EU can align and collaborate with its Member States to offer sector-specific solutions that build upon hard infrastructure.

EU Member States would be empowered to focus on what they do best: tailoring to the practical needs of companies and consumers in partner countries, for example on AgriTech, HealthTech or EdTech applications. This would moreover enable them to develop and export digital technologies, an area where the EU needs to catch up with the US and China.

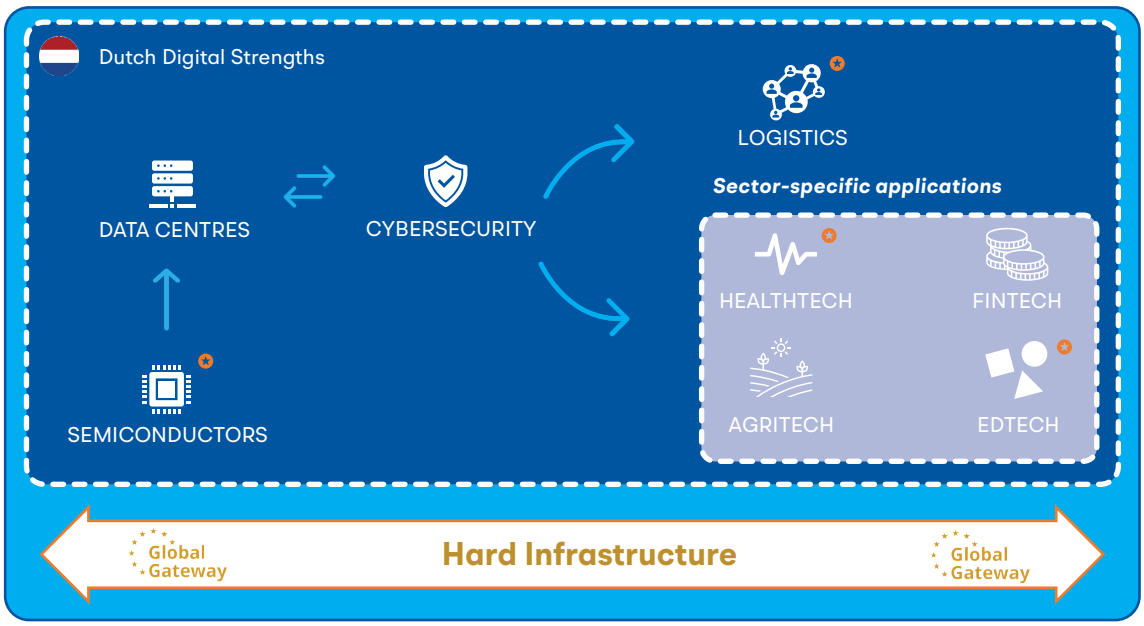
Despite persistent urban–rural divides, several partner countries already have a good basic level of digital connectivity. The next leap forward they seek in the digital domain often concerns sector-specific applications with immediate social impact, rather than grand infrastructure projects. This certainly goes for Indonesia, South Africa and India – countries that the Netherlands regards as preferred partners for engagement.

This Policy Brief aims to identify concrete opportunities for the Netherlands to strengthen its engagement with Indonesia, South Africa and India while contributing to the EU's Digital Global Gateway with sector-specific solutions. Starting from an analysis of notable Dutch digital strengths, a subsequent section assesses how the Netherlands can tailor its digital strengths to the wishes of these three countries.[4] Next, a short analysis follows of what Europe can learn from the three countries' relationships with China on digital offers. This Policy Brief concludes with reflections and actionable steps on how to move (Digital) Global Gateway closer to realising its potential.

3 Council of the European Union, *Global Gateway: Council endorses flagship project list for 2025*, 2 December 2024.

4 Government of the Netherlands, *Policy Document for Foreign Trade and Development Cooperation: Do what we do best*, 10 October 2022.

Figure 1 **Dutch strengths to contribute to Digital Global Gateway**



Source: authors' compilation. The icon '✪' highlights the new sectors identified and analysed in this Policy Brief. For more information about the other sectors, see Alexandre Gomes and Maaike Okano-Heijmans, Dutch Niches for Global Gateway in the Digital Domain: An initial enquiry, October 2023.

Digital Netherlands

The Netherlands consistently ranks among the top-five European countries in digitalisation.[5] It is among the best-connected countries in the world and home to one of Europe's most valuable tech companies: lithography equipment producer ASML. ASML, in turn, relies on a complex supply chain with hundreds of suppliers, in the Netherlands and neighbouring countries. Other well-known digital brands, like Booking.com and FinTech champion Adyen, are also Dutch.

Earlier research identified four key sectors where Dutch strengths can contribute to Digital Global Gateway: Data Centres, Cybersecurity, AgriTech and FinTech.[6] These sectors are well developed in the Netherlands, with a vibrant ecosystem consisting of deep expertise and successful companies. But Dutch tech-savviness also exists in other digital sectors. This section highlights four additional strengths that can be leveraged to elevate Digital Global Gateway: HealthTech, EdTech, Semiconductors and Logistics. Figure 1 illustrates this schematically.

HealthTech

HealthTech encompasses the use of technology to improve healthcare delivery, be it in the prevention, diagnosis or treatment phases, monitoring or overall management of health lifestyle. The array of technologies supporting these goals range from medical devices to information management systems, mobile health apps and wearable devices, telemedicine or 3D printing for medical applications, just to name a few. A 2021 Techleap report counted over 1,000 HealthTech startups in the Netherlands, despite the landscape still being largely dominated by a few key players such as Philips.[7]

5 Analysis of the European Digital Economy and Society Index (DESI) over the past ten years. See European Commission, *The Digital Economy and Society Index (DESI)*.

6 Alexandre Gomes and Maaike Okano-Heijmans, *Dutch Niches for Global Gateway in the Digital Domain: An initial enquiry*, Clingendael Policy Brief, 23 October 2023.

7 Techleap, *Dutch HealthTech 2021 Report: Unlocking its untapped potential*, 2021.

Philips, a member of the Global Gateway Business Advisory Board, has yet to yield any concrete outcomes through its involvement,[8] as the company is not involved in any announced project so far. The lack of active engagement from one of the biggest European HealthTech players in Global Gateway (GG) may be seen as an illustration of the failure so far of Global Gateway to engage the private sector.

As of early 2025, no Dutch HealthTech players are engaged with any Digital projects: neither in the ongoing 21 projects under GG's Health pillar, nor in the six newly announced digital projects for 2025. This disconnect does not only originate from the EU side, but is also recognisable at the Dutch national level. The 2024–2027 strategy of the Dutch Life Sciences and Health International Committee does not mention Global Gateway, despite the potential of this initiative to help further internationalise Dutch companies in the sector,[9] both by supporting Public–Private Partnerships to increase innovation capabilities and international positioning, and using diplomatic means.

EdTech

EdTech, or Educational Technology, refers to the use of technology to enhance and support teaching and learning processes at all stages of life. It encompasses a wide range of tools, resources and methodologies designed to improve educational outcomes across various settings, including kindergarten through 12th grade, higher education institutions or corporate training environments.

According to the 2024 report by Dutch EdTech, the number of Dutch EdTech companies increased from 407 to 475 in the past three years, with the number of employees rising sharply from 2,500 to 11,000. The Netherlands has also significantly increased its market share in the European market, growing from 1.8 percent in 2019 to 8.1 percent in 2023. Companies offering upskilling tools and services are growing the most in terms of investment, which reflects the strength of the Lifelong Learning market segment, the largest in the Netherlands. Another notable trend is the incorporation of artificial intelligence (AI) in EdTech: of the 72 percent of companies that report using AI in their products, almost half do it for content creation and curation purposes. International expansion is a challenge for 14 percent of the companies surveyed, and most report the limited scale of the Dutch market as a challenge for growth, although 46 companies are already operating abroad.

Greater use of EdTech can contribute to reducing the global shortage of knowledge on technical areas, often reported by the private sector, as well as the growing concerns around digital skills and literacy. Dutch EdTech has much to offer in this space, whether under Global Gateway's Digital pillar or under its Education and Research pillar. Much the same as for HealthTech, no Dutch projects in this field are included under either the Digital or Education pillars of Global Gateway.

Semiconductors

Semiconductors are at the heart of the current digital and AI revolutions. They are the fundamental building blocks of electronic devices like computers and smartphones, data centres and all the gadgets and technologies we use today. Dutch lithography equipment maker ASML is a key chokepoint in the global supply chain of semiconductors. The Veldhoven-based company has an effective monopoly over the most advanced lithography equipment in the world, based on Extreme Ultra-Violet technology. ASML is the central player in the Dutch semiconductors industry, which is anchored in the Brainport Eindhoven ecosystem – a hub/home to some 300 semiconductor companies and knowledge institutions. Other well-known Dutch companies in this sector are ASM, STMelectronics, NXP and Besi. The Netherlands leads in the equipment, integrated device

8 The Global Gateway Business Advisory Group, launched in September 2023, has been set up to strengthen cooperation on Global Gateway strategy and implementation between the European Commission and the European private sector. See: European Commission – International Partnerships, *Global Gateway Business Advisory Group*.

9 Dutch Life Science and Health International Committee, *Internation Strategy 2024–2027*, 2024.

manufacturing and photonics segments[10] and boasts very well-trained professionals and talent.

Building a semiconductors ecosystem is a costly and time-consuming process. Countries in the Global South, including Indonesia and India, are making efforts to develop their own capabilities, seeking to replicate Dutch success in this field and luring Dutch semiconductor investments to their country. Although the leeway to steer investments by European semiconductor companies to certain countries is far more limited compared to sector-specific applications, the EU and its Member States can still incentivise relevant companies to invest in strategically important locations, as the US has done.[11]

In the context of growing export controls on semiconductor companies operating in China, Global Gateway could support Europe's de-risking agenda by helping to shift supply chains beyond just China to South-East and South Asian countries. Such moves also align with the ambitions of partner countries to develop their capabilities in semiconductors. Given that concentration of semiconductor manufacturing is highly concentrated in Taiwan, a geopolitical flashpoint, creating the conditions for partner countries to enter parts of the supply chain can benefit all parties involved in the long run.

Digital Logistics

The Port of Rotterdam, the largest in Europe, is a key reason why the Netherlands plays a pivotal role in global (maritime) logistics. The Netherlands has a long history in (maritime) trade and the Port of Rotterdam contributes roughly 3.2 percent to the Dutch Gross Domestic Product.[12] Given the strategic role of the port and its hinterland transport infrastructure – including the 389 inland terminals in the Netherlands[13] – the Dutch government designates logistics as one of its ten so-called *top sectors*, to which it dedicates special attention, supported by the expertise present in the country. Key components of this supply chain include terminal operations, distribution, transportation – including rail, inland shipping and trucking – and warehousing. The Netherlands is a leader in all of these areas.

However, the logistics sector is highly fragmented, and dozens of parties are involved in moving every single container between any origin and destination. As a result, data sharing and interoperability are crucial elements for logistics, but they remain a challenge as the parties involved are normally reluctant to share their data for competition reasons.

The criticality of the logistics sector extends beyond its economic and geopolitical implications: it is also intrinsically tied to sustainability. Transportation contributes to 25 percent of the EU's greenhouse gas emissions, and the European Green Deal aims to achieve a 90 percent reduction in these emissions by 2050.[14] One of the key pillars of the European approach to maritime transport logistics is federated data sharing, supported by the Data Act: a decentralised approach that aims to empower all stakeholders involved in the supply chain, including by providing real-time inventory control and more efficient supply-chain workflows. The Netherlands is taking a leading role in driving the discussion at the European level. The European logistics sector is seeking to develop a global standard for digital collaboration based on these principles, and Global Gateway can be a way to achieve this

10 PWC, *Semicon in NL*, May 2024.

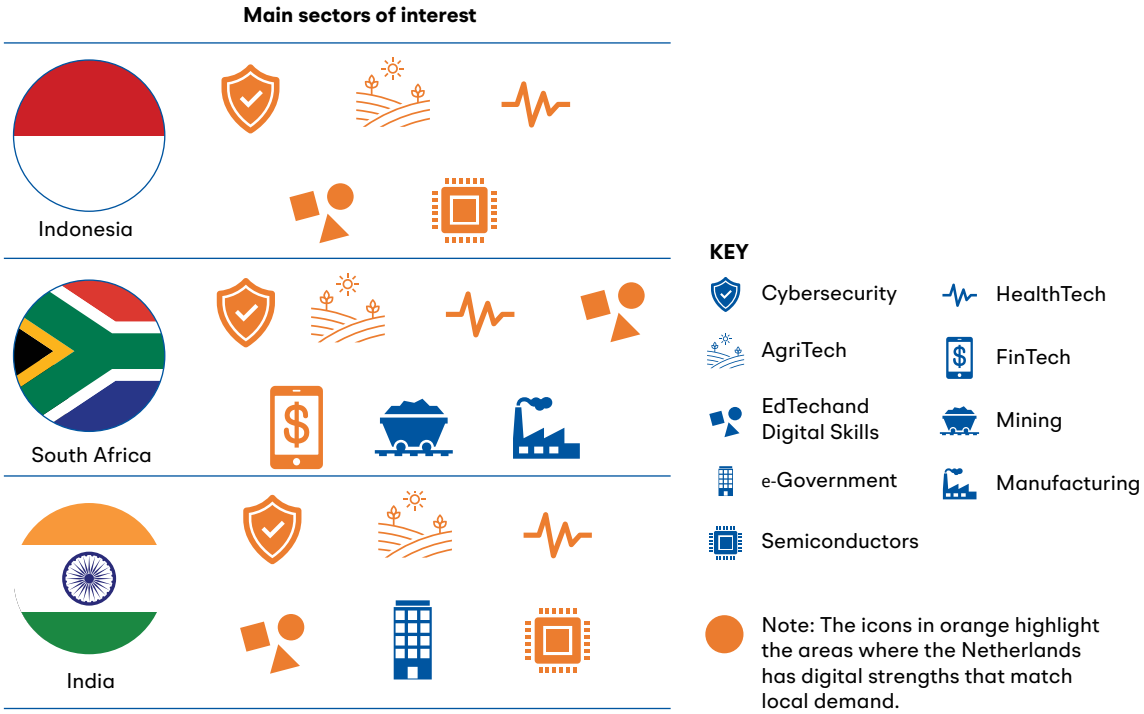
11 The biggest semiconductor companies possess the financial capacity to invest abroad without government support, have the organisational means to do so and carefully select the locations where they invest based on the presence of a pre-existing ecosystem in the sector. That said, government incentives can still steer investments in specific directions: the US CHIPS and Science Act includes, for example, national security guardrails that seek to ensure that manufacturing and technology investments under this act bolster technological and national security of the US, its allies and partners, such as India. See: NIST, *Biden–Harris Administration Announces Final National Security Guardrails for CHIPS for America Incentives Program*, 22 September 2023.

12 Port of Rotterdam, *Facts and Figures*.

13 Offshore Energy, *Ports of the Netherlands*, 24 February 2024.

14 European Commission, *Sustainable Transport*.

Figure 2 **Sectors or industries where the Netherlands has potential to contribute to Indonesia's, South Africa's and India's digital progress**



Source: Authors' compilation.

from bottom–up by bringing efficiency benefits to partner countries as well as for European companies that work closely with them.

How can the Netherlands support Digital GG in Indonesia, South Africa and India?

Figure 2, above, presents the Dutch digital strengths that align with and address the local needs and interests of Indonesia, South Africa and India. In doing so, it follows the same methodology that was used with earlier case studies on Kenya, Egypt and Vietnam, detailed in earlier Policy Briefs in this mini-series.[15]

Areas of common interest for Indonesia, South Africa and India

Cybersecurity, EdTech, AgriTech and HealthTech emerge as four shared areas of interest among the three analysed countries, aligning with what the Netherlands has to offer.

Indonesia, South Africa and India require stronger cybersecurity to support the steep growth their digital economies have faced over the past two decades. As digitalisation of economic sectors continues and more people use internet services daily, cyber threats also mount. Cybersecurity is therefore the biggest challenge the three countries face to ensure sustainable growth.

Awareness of the threats cyberspace poses is the foundational layer of protection of any digital system, which is why cybersecurity ties to EdTech and digital skills. Education and cyber awareness lag behind in the three countries, as cybersecurity is often treated as an afterthought,

15 Alexandre Gomes and Maaike Okano-Heijmans, *Harnessing the Potential of Digital Global Gateway: Towards sector-specific applications*, Clingendael Policy Brief, February 2025.

both in the public and private sectors, as well as at an individual level. Moreover, EdTech is part of these countries' strategy as they work to prepare future generations of scientists and engineers who can help them to move up the tech supply-chain ladder.

AgriTech addresses two pressing challenges: climate change and demographic trends. Dutch preparedness to deliver on areas like precision agriculture, greenhouse technology or vertical farming can play a pivotal role in responding to pressing needs from these countries in developing their agricultural sectors in a sustainable and energy-efficient manner.

Regarding HealthTech, the needs from Indonesia, South Africa and India are vast. These range from equipment to management systems and enhancing the countries' ability to deliver medication and care in remote areas. The urban–rural divide, coupled with demographic shifts – especially population growth – are important drivers for the growing interest in HealthTech.

Areas of particular interest for partner countries

Indonesia and India have a strong interest in engaging with the Dutch semiconductor sector as part of their broader efforts to develop local semiconductors industries, in order to move up the value chain and strengthen knowledge and skills in this important domain.[16] Delivering on this is not an easy endeavour, however. Building and developing a semiconductor sector is very capital-intensive and requires a range of preconditions, including the complex infrastructure and highly skilled workforce necessary to support it.

European semiconductor companies remain reluctant to engage actively with Indonesia and India, as the physical and knowledge infrastructure in these countries is not yet sufficiently developed.[17] Global Gateway could serve as a framework to improve on the local preconditions, thereby encouraging European companies' investments in India and Indonesia. If successful, this diversification of European semiconductor supply chains will also contribute positively to the EU's Economic Security agenda. In 2025, the EU included the expansion of a power semiconductor fab in Malaysia in its list of Global Gateway projects (see Table 1). This signals the EU's move towards incorporating the semiconductors sector into the program and makes the project in Malaysia an important test of the bloc's ability to deliver in this field together with the private sector – in this case, German semiconductor company Infineon.[18]

India and Indonesia have well-developed internal markets for FinTech, while South Africa still lacks that capacity but is invested in increasing the range of offerings to its citizens. The Netherlands would benefit from exploring the extent to which its FinTech industry is available and interested in principle to these efforts, particularly in South Africa, where there is significant potential for growth in the sector.

The logistics sector is not identified as an area of special interest by any of the three countries under investigation in this Policy Brief mini-series. Still, it is worthwhile to address this sector in bilateral talks and within the context of Digital Global Gateway with Indonesia, South Africa and India. After all, these countries are key commercial hubs and partners for Europe, and their positions in global trade are likely to gain in importance over the coming years. Trade routes to and from these three countries depend on the quality of their port infrastructure. Therefore, optimisation of processes and supply-chain

16 The Diplomat, *Indonesia's Bold Bid to Become a Semiconductor Hub*, 16 August 2024; CNBC, *India Wants to Become a Semiconductor Powerhouse, but it Can't Do It on its Own*, 25 September 2024.

17 Note the investments made by Dutch NXP in Singapore and Malaysia over recent years, or BESI in Vietnam, among others. See: NXP, *VIS and NXP to Establish a Joint Venture to Build and Operate a 300mm Fab*, 5 June 2024; Vietnam Investment Review, *Dutch Firm BESI to Invest Additional $42 Million to Expand Chip Equipment Project in SHTP*, 18 February 2025.

18 Infineon, *Infineon opens the world's largest and most efficient SiC power semiconductor fab in Malaysia*, 8 August 2024.

operations, as well as interoperability, will become points of growing attention in the digital transformation. As such, cooperation in this domain is worth exploring in the Digital Global Gateway context.

Knowing the partners of our partners, notably China

Global Gateway offers are just one of several available options from which partner countries can choose. For Europe's enhanced engagement with these partners to be successful, the EU's strengths ought to be considered next to those of other players, in order to tailor its approach to each partner country. The main country to reckon with in this regard is China.

A key factor for Indonesia in deciding which digital equipment to buy and where to buy it from is price. This results in a certain dependency on China's cost-effective propositions, despite the cybersecurity risks that Indonesia acknowledges. Procurement for mobile network equipment illustrates this, for instance: Indonesia has prioritised the rapid increase of access to coverage across the country, while the US and Europe have sought to reduce, or even eliminate, the presence of Chinese equipment because of security concerns.[19] Lacking a price-competitive alternative to the Chinese proposition, Indonesia regularly opts for Chinese offers.[20] Given this reality in Indonesia regarding networks and infrastructure, the EU would benefit from adopting a more sector-specific approach, rather than focusing on grand infrastructure projects. The digital needs highlighted in this Policy Brief, such as in HealthTech and EdTech, may be an important entry point for Digital Global Gateway in Indonesia, in which local officials do wish to engage.

By comparison, it may prove more difficult to sway South Africa towards European propositions, as Pretoria perceives virtually no limits to digital cooperation with China. To engage South Africa more effectively, the EU would benefit from putting forward concrete propositions and opportunities that enhance South Africa's ability to deliver to local populations, while avoiding dependencies on a single partner. Another way is for the EU to highlight its trade, investment and cooperation results with other BRICS countries, namely India and Brazil, or indeed other African countries. The EU and South Africa hold frequent joint cooperation council meetings, and the South Africa–EU Strategic Partnership, established in 2007, is the only one the EU has at the country level in the African continent. These fora can be valuable entry points to push for greater cooperation between the two sides on digital matters.

The case of India differs from Indonesia and South Africa, as India is actively trying to reduce its digital ties with China because of the tensions that exist between the countries.[21] India's own strength in the digital domain, coupled with a long-term strategy of leveraging its Digital Public Infrastructure and related offerings to third countries, requires that the EU and its Member States should approach their Digital Global Gateway engagement more as an equal partnership. Although this makes India a competitor on certain fronts, it also creates a greater scope for EU–India collaboration at the same time. The EU and its Member States would do well to respond to the immediate local needs highlighted above: cybersecurity, AgriTech, EdTech and HealthTech, as well as in the semiconductors business, where India wants to emerge as a manufacturing hub.

19 Telecoms, *Indosat's Latest Huawei Deal Underscores Beijing's Diplomatic Triumph over Washington*, 7 August 2024.

20 Another prominent example (beyond the digital domain) was Indonesia's decision in 2015 to select China over Japan for the execution of the Jakarta–Bandung high-speed rail project.

21 Note, for instance, that India was the first major country to ban TikTok permanently in June 2020. See: Time, *Here's What Happened When India Banned TikTok in 2020*, 18 January 2025.

Leveraging our strengths and listening to our partners

At the 2024 Tallinn Digital Summit, Estonian Minister of Foreign Affairs Margus Tsahkna argued for Global Gateway to expand its scope to include more focus on the applications layer, stating that would be a way for smaller EU Member States, with expertise in specific areas, to make a significant contribution to the programme.[22] In the same discussion panel, the Angolan Minister of Telecommunications Mário Oliveria emphasised the need for Europe to study partner countries and the needs they have in greater detail, and to design solutions together. He also highlighted the excessive focus on hard infrastructure, while pointing out that other digital matters have been overlooked by Europe.

Europe's slow progress on Digital Global Gateway is evidenced by the latest list of Global Gateway projects, almost half of which concern the pillar of Climate and Energy. This focus may be logical from a European perspective, as it matches the EU's Green Agenda and desire to assist partner countries with energy transition efforts. However, partner countries are also interested in reaping the short-term benefits of digitalisation.

Europe would moreover do well to tie its push for energy transition with promotion of digital technology – thereby truly acting on the twin transitions. This approach would involve delivering 'low-hanging fruit' projects that address the more pressing needs of partner countries. As this Policy Brief has shown, areas like cybersecurity, EdTech, HealthTech and AgriTech, where the Netherlands excels, are at the top of the wish lists of Indonesia, South Africa and most likely many other partner countries. These sectors should therefore be taken into account and incorporated within the Digital Global Gateway offering. At the intersection of the Digital and Health pillars, HealthTech, representatives of both industry and partner countries, such as Angola, have raised the concern that too much emphasis is placed on building vaccination facilities, while segments of that market such as medical devices and information management systems have been underexplored.

European Commission President Ursula von der Leyen asked High Representative for Foreign Affairs and Security Policy Kaja Kallas to make use of Global Gateway as an instrument that helps in shaping 'a new foreign economic policy, [...] investing in mutually beneficial partnerships around the world'.[23] EU Member States' active engagement with Global Gateway is a requirement for its success, and the challenge is to tie and coordinate Member States' sector-specific offers to larger EU infrastructure schemes, or even to offer them independently, under the Global Gateway umbrella. Von der Leyen has also called for better transparency and communication, namely via 'visible tracking and reporting of Global Gateway, including on the mobilisation of private funding, and measuring impact and results of investments'.[24] Enhanced engagement with the private sector, for instance through the Global Gateway Business Advisory Council, is another crucial step to success. Both sides stand to gain from more regular meetings and timely sharing by the EU and its Member States of information, such as planned (flagship) projects to which companies can connect and engage.

The good news is that a growing number of EU Member States are actively considering how to contribute to Global Gateway and that bilateral cooperation agreements and dialogues with partner countries are on the rise. Yet, officials in partner countries remain largely unaware about what Global Gateway is or how to engage

22 Estonia Ministry of Foreign Affairs Margus Tsahkna, *Tallinn Digital Summit 2024: Black Box stage, 20 November*, watch from 1:42:50.

23 Ursula von der Leyen, *Mission Letter for High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission Kaja Kallas*, 17 September 2024.

24 Ursula von der Leyen, *Mission Letter for Jozef Síkela, Commissioner-designate for International Partnerships*, 17 September 2024.

with it. The label of Europe's flagship initiative appears to be rarely used by local embassy staff, for instance. This lack of coherent outreach and strategic communication hinders the construction of broad awareness and a positive image. Here goes the saying: the EU can only be what the Member States make of it. Halfway through Global Gateway's first phase, active matchmaking between the strengths of the EU and its Member States with the needs of partner countries is the way to turbocharge its potential.

About the Digital Global Gateway Policy Brief Series

This Policy Brief is the fifth in a series on Digital Global Gateway that, taken together, offer actionable steps for the Dutch government – and, similarly, other EU Member States – to contribute to the EU's Digital Global Gateway. Building on the 2023 mini-series that focused on Egypt, Kenya and Vietnam, the 2025 publications focus on Indonesia, South Africa and India.

The series includes the following pieces:

- Dutch Niches for Global Gateway in the Digital Domain: An initial enquiry (October 2023);
- Digital Global Gateway: How Can We Help? Towards better understanding of local needs (November 2023);
- Digital Global Gateway Matchmaking: A Dutch case study to bolster European action (November 2023);
- Harnessing the Potential of Digital Global Gateway: Towards sector-specific applications (February 2025);
- Connecting the Dots: Linking Digital Global Gateway to local sector-specific wishes (April 2025).

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About the International Partnerships Tracker

This Policy Brief is part of the PROGRESS-series 'International PartnershipsTracker', with contributions by experts from the Clingendael Institute and The Hague Centre for Strategic Studies (HCSS). The series informs policymakers and stakeholders about Europe's partnerships and collaboration frameworks that strengthen its strategic position and outline actionable steps in a rapidly evolving geopolitical landscape.

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