
Global Gateway 2030

Future of
Europe's global
infrastructure bid



IN-DEPTH ANALYSIS

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In December 2021, the European Union launched the Global Gateway, a €300 billion infrastructure investment strategy to build sustainable and secure connections in the digital, energy and transport sectors to boost Europe's competitiveness and supply-chain security across the world. What will the future of this strategy look like? This paper presents four scenarios for the Global Gateway in 2030: 'optimal gateway', 'failed gateway', 'corporate gateway' and 'public gateway', based on the responses of 30 surveyed policy experts.

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The scenarios in this paper have been produced drawing partly on the assistance of artificial intelligence. While the dataset used was exclusively the result of an EPRS survey of 30 experts, use of other sources cannot be excluded. However, the output produced has undergone thorough review by the author and the editorial service of EPRS.

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Executive summary

An infrastructure investment strategy to build sustainable and secure connections in digital, energy and transport sectors to boost Europe's competitiveness and supply chain security across the world, the European Union launched its Global Gateway in December 2021. The strategy is aimed at mobilising up to €300 billion in investment in projects between 2021 and 2027 to help narrow the global infrastructure investment gap.

Smart, clean and secure investments in facilities such as fibre-optic cables, transport corridors and power transmission lines could bolster digital, transport and energy networks. A first milestone of the strategy was the introduction of the Africa-Europe Investment Package, which aims to raise approximately €150 billion of investment by 2027, in cooperation with African partners.

Based on the contributions of 30 surveyed experts, this paper presents four scenarios for the Global Gateway in 2030.

- Optimal gateway scenario: effective engagement with partner countries' needs and active private sector investment mean the Global Gateway is able to secure diversified supply chains, geopolitical advantages and improved external relations for the EU.
- Failed gateway scenario: the Global Gateway fails to attract the interest of both partner countries and the private sector. Insufficient private investment leads to a lack of funds, while projects that are undertaken are seen as extractivist and neocolonial, thus harming the EU's reputation.
- Corporate gateway scenario: the Global Gateway succeeds in securing European business opportunities in the Global South and enhances the performances of EU companies, but benefits Global South countries to a lesser extent, thus leading to criticism.
- Public gateway scenario: private investors are scarce but the available funds are used to respond to the needs and priorities of Global South partner countries. Those projects that are undertaken manage to enhance the EU's reputation among Global South partners.

The paper concludes with policy considerations raised by the policy experts surveyed.

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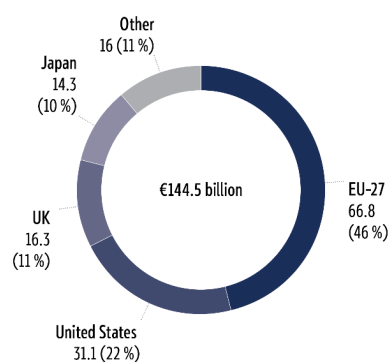
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EU Global Gateway

An EU infrastructure investment strategy to build sustainable and secure connections in digital, energy and transport sectors aimed at boosting Europe's competitiveness and supply chain security across the world was launched in December 2021. Called the Global Gateway, the strategy aims to mobilise up to €300 billion of investment in projects between 2021 and 2027 to help narrow the global infrastructure investment gap.¹

Funding for projects under the Global Gateway is delivered through the 'Team Europe' approach, bringing the EU and Member States' initiatives together, alongside financial and development institutions and the private sector. In a 2023 speech on the Global Gateway, the EU's High Representative of the Union for Foreign Affairs and Security Policy (HR/VP), Josep Borrell, said 'The EU and its Member States are by far the biggest provider of development aid to the "Global South", but we still lack an effective enough coordination on this matter' (see Figure 1).² The Global Gateway serves to make European development finance more cohesive, thereby helping to avoid overlaps, gaps and inefficiencies. The result should be more strategic and coordinated use of existing European development funds through the 'Team Europe' approach.

Figure 1 – Official development assistance in € billion, 2020



Source: based on [Wilson Center](#), using OECD data. Graphic by S. Chahri, EPRS.

Facilities such as fibre-optic cables, transport corridors and power transmission lines could be created through smart, clean and secure investments and bolster digital, transport and energy networks. The introduction of the Africa-Europe Investment Package, aimed at investing approximately €150 billion in cooperation with African partners by 2027 signified a first step in the strategy, with 90 projects launched worldwide in 2023.³ The Global Gateway, while largely presented as a development initiative, is partly geopolitically motivated. European Commission President Ursula von der Leyen confirmed in a 2022 interview that the Global Gateway serves to counter China's growing influence and provide better alternatives to Chinese infrastructure finance.⁴ The Global Gateway furthermore responds to the global infrastructure investment gap, which G20 research projects to reach €13 trillion by 2040. This underinvestment harms connectivity, development and climate goals worldwide and especially in low and middle-income countries where infrastructure investment is most needed – and declined further during the pandemic.

Principles

Global Gateway projects should strengthen resilience, sustainability and cooperation with like-minded partners, with a focus on five global challenge priorities: digital, climate and energy,

¹ The sections under 'EU Global Gateway' (except 'Assessment') draw heavily upon Marcin Szczepeński, [The Global Gateway: Taking stock after its first year](#), EPRS, European Parliament, 2023.

² Josep Borrell, [Global Gateway, EU's proposal in the global 'battle of offers'](#), European External Action Service, 2023.

³ European Commission, [EU-Africa: Global Gateway Investment Package](#), 2023.

⁴ European Commission, [President von der Leyen's joint interview with Les Echos and Handelsblatt](#), 2022.

transport, health, and education and research. Partnerships under the Global Gateway should furthermore be based on six key principles:⁵

Democratic values and high standards: Global Gateway projects adhere to the rule of law and uphold high human, social and workers' rights, international rules and intellectual property standards. High ethical standards should avoid the creation of unsustainable debt or undesired dependencies.

- Good governance and transparency: Projects are transparent, accountable and financially sustainable, and adhere to open access to public procurement and a level playing field for potential investors. Public consultations and civil society involvement ensure the inclusion of affected parties and projects should ensure affordable and equal access to their services and benefits.
- Equal partnerships: Partner countries should be closely involved in the design, development and implementation of projects. Projects respond to the needs and opportunities present in partner countries as well as to the EU's own strategic interests.
- Green and clean: The Global Gateway shall be climate-neutral and speed up sustainable development and the transition to a cleaner and more circular global economy. It is aligned with net zero emission targets, fosters investment in clean and climate-resilient infrastructure and provides environmental impact assessments.
- Security focused: Global Gateway projects should mitigate vulnerabilities, build trusted connectivity and counter physical, cyber or hybrid threats as well as economic coercion. Citizens should be protected against unwarranted surveillance.
- Catalysing private sector investments: The Global Gateway should make full use of Europe's world-leading private sector capacities by engaging private capital through the leveraging of public resources from the EU, its Member States, financial institutions and multilateral public finance.

Implementation

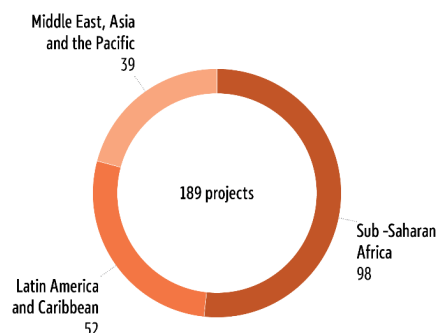
The €300 billion budget that the Global Gateway aims to raise between 2021 and 2027 includes €135 billion in private sector investment, which should be attracted by €40 billion in EU guarantees, €26.7 billion of which is financed by the European Investment Bank (EIB) and €13 billion by the European Fund for Sustainable Development Plus (EFSD+). This is complemented by €18 billion in EU grants and €145 billion in planned investments through volumes reserved by European financial and development finance institutions. The Global Gateway is intended to have a leverage factor of 5.15, meaning that EU guarantees attract over five times their amount in private investment, which is consistent with similar schemes in the past such as the Juncker Plan. Financial instruments, including the Neighbourhood, Development and International Cooperation Instrument, the Instrument for Pre-Accession Assistance (IPA) III, Interreg, InvestEU and Horizon Europe, will all help guarantee investment capacity and leverage private investment.⁶

⁵ European Commission, [Press release: Global Gateway: up to €300 billion for the European Union's strategy to boost sustainable links around the world](#), 2021.

⁶ Carlos Buhigas Schubert• and Olivier Costa, [Global Gateway: Strategic governance and implementation](#), Policy Department for External Relations, European Parliament, 2023.

The Global Gateway is supervised by the Council of the EU and its Committee of Permanent Representatives (Coreper). The implementation of the strategy is guided by the Global Gateway Board, made up of the President of the European Commission, the HR/VP, the Commissioner for International Partnerships, the Commissioner for Neighbourhood and Enlargement, and the Commissioners responsible for the Global Gateway's priority areas, together with representatives of all EU Member States. The European Parliament has observer status on the board, together with the EIB, EBRD, Member State financial institutions and other stakeholders. A Global Gateway steering committee forms part of the Global Gateway secretariat and is chaired by the Secretary-General of the Commission, and furthermore composed of the Secretary-General of the European External Action Service (EEAS) and relevant directors-general and heads of unit. They follow the day-to-day processes of the Global Gateway and provide support to the Board. The Business Advisory Group (comprised of up to 60 private sector members) provides consultation, together with partner countries, the European Parliament (which has responsibility for budgetary oversight through the discharge procedure) and civil society organisations. Figures 2 and 3 show the geographical and thematic distribution of Global Gateway flagship projects, with most in Africa and focused on climate and energy.⁷

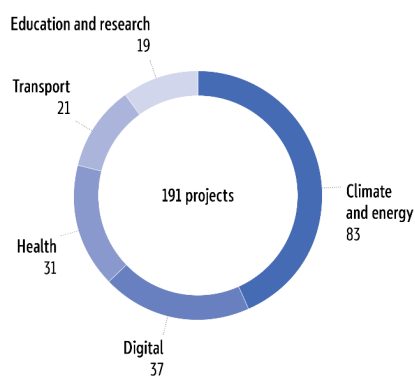
Figure 2 – Projects per region



Data source: [Global Gateway](#), European Commission, 2024. Graphic by S. Chahri, EPRS.

Global Gateway projects will be developed and delivered through 'Team Europe' initiatives involving EU institutions, Member States and European financial institutions in collaboration with the private sector. Africa has emerged as the focus of the strategy. The first regional Global Gateway Africa-Europe Investment Package, launched in February 2022, which will mobilise up to €150 billion is perceived as the most significant initiative to date. The package aims to boost public and private investment to help support Africa in an inclusive, green and digital transformation. It focuses on clean energy, biodiversity, agriculture, climate resilience, disaster risk reduction, transport, health systems, science and technology, education and training, supporting businesses and sustainable value chains including minerals and raw materials. While in 2010, the EU and China both still provided around 40 % of construction and investment in Africa, China's share rose to 60 % and Europe's fell to 20 % by 2018.⁸ The Global Gateway thus also serves to retighten EU-Africa ties and increase Europe's competitiveness vis-à-vis China in Africa, as well as in other developing regions.

Figure 3 – Projects per theme

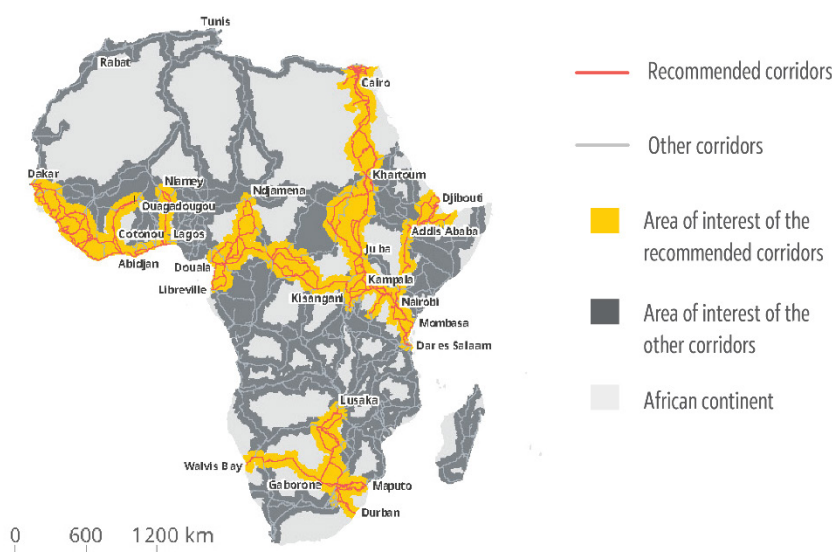


Data source: [Global Gateway](#), European Commission, 2024. Graphic by S. Chahri, EPRS.

⁷ European Commission, [Global Gateway in Sub-Saharan Africa](#), 2023.

⁸ Eugénia C. Heldt, [Europe's Global Gateway: A New Instrument of Geopolitics](#), *Politics and Governance* 11(4), 2023.

Figure 4 – Strategic corridors identified for the Global Gateway in Africa



Source: based on: [EU-Africa: Global Gateway – Strategic Corridors](#), European Commission, 2022. Graphic by S. Chahri, EPRS.

The Global Gateway's project selection process follows the following steps:⁹

- An EU delegation identifies a project, in consultation with national governments and implementing partners (international financial institutions, national agencies, civil society etc.);
- Delegation submits the project to the Strategic Steering Committee and for strategic validation within the Commission's Directorate-General for International Partnerships and EEAS;
- Delegation formulates the project in greater detail;
- All relevant directorates-general and services take part in inter-service consultation on the project, each with the right to veto;
- Member States examine the project (documents are also shared with the European Parliament);
- If the Member States agree, European Commissioners adopt the project.

Assessment

A study on the strategic governance and implementation of the Global Gateway prepared by the Policy Department for External Relations at the request of Parliament's Committee on Foreign Affairs (AFET) provides an assessment of the initiative.¹⁰ It posits that the Global Gateway is much more than an EU initiative to tackle the infrastructure gap, as it is officially presented, but rather a new experiment in EU foreign policy. It lists a number of successes for the Global Gateway in its first year:

⁹ Carlos Buhigas Schubert and Olivier Costa, [Global Gateway: Strategic governance and implementation](#), Policy Department for External Relations, European Parliament, 2023.

¹⁰ *ibid.*

- Projects identified are aligned with the strategy's objectives and relevant to the EU's strategic priorities;
- Initiatives are aligned with EU policies, such as the green and digital transitions and international commitments;
- The Global Gateway has struck the right balance between the EU's normative power approach and donor role and the new geopolitical undertone of challenging China's Belt and Road Initiative (BRI);
- The 'Team' Europe approach has provided genuine added value compared to what could be achieved by the Commission or Member States on their own;
- The Global Gateway has the potential to significantly impact EU external action through its cooperation with partner countries to enhance global infrastructure that will increasingly assert the EU's influence across the globe.

The study also identifies issues requiring improvement:

- Little is known about the Global Gateway, including concerning partner country demand in less developed areas and their (technical) capacity to absorb its initiatives. This is also true for partner countries' role in defining projects. The Global Gateway is perceived as EU-centric, which is at odds with its ethos of equal partnership.
- The Global Gateway's governance structure reflects the complex distribution of responsibilities between the EU and Member States but lacks a dedicated technical coordination structure with sufficient resources for the day-to-day management of the Global Gateway, stakeholder management, communications and consultations.
- The Global Gateway's financial architecture is inherited from EU development financing and consists of a complex web of EU initiatives using different EU financing instruments that change constantly. The result is unclear and fails to enhance the Global Gateway's geopolitical goals.
- It remains unclear how Global Gateway projects differ from non-Global Gateway projects. Clear guidelines on what a Global Gateway project should be are lacking. Some Global Gateway projects do not appear to respond to the strategy's priority areas.
- Doubts persist about the Global Gateway's commitment to development targets and its own stated principles. Its top-down geostrategic decision-making, tied to short-term economic gains and third-party interests, could undermine the strategy's values and development goals.

For those areas most urgently in need of improvement and that merit European Parliament scrutiny, the study recommends:

- Information on Global Gateway projects should be made available to the public coherently and consistently, updated frequently and presented in an understandable, professional and user-friendly manner;
- Communication about the Global Gateway's strategy, added value and progress should be better explained to partner countries and stakeholders;
- An adequate governance model should be established for the Global Gateway;

- Global Gateway initiative criteria, the EU's specific priorities and the process for selecting projects should be clarified;
- An evaluation system that monitors and reports on Global Gateway activities and results should be created.

European Parliament position

The European Parliament has observer status on the Global Gateway Board,¹¹ and has adopted a number of resolutions mentioning the Global Gateway. Some of these resolutions reinforce the idea that the Global Gateway exists for cooperation with the United States and other G7 partners, while China should be resisted. For instance, in a resolution of 17 February 2022 on the implementation of the common foreign and security policy, the Parliament urged the EU to continue developing the G7 'Build Back Better World' initiative by identifying mutually reinforcing links with the Global Gateway.¹² In Parliament's recommendation of 13 December 2023 concerning EU-US relations, it likewise advises that the EU should 'foster cooperation with the US to make sure that the EU's Global Gateway initiative is well coordinated with the G7 Partnership for Global Infrastructure and Investment'.¹³

In contrast, in its recommendation of 13 December 2023 concerning EU-China relations, Parliament urges the EU to 'respond adequately to China's increasing efforts to change the multilateral rules-based order ... by increasing the EU's presence in the Global South, namely through its Global Gateway strategy, to create alternative secure infrastructure to China's Belt and Road Initiative'.¹⁴ In a resolution of 17 January 2024 on the security and defence implications of China's influence on critical infrastructure in the EU, the European Parliament calls on the Commission, the EEAS and Member States to 'intensify efforts, including attracting investments from the private sector, to implement the Global Gateway'.¹⁵

The Parliament's resolution of 17 January 2024 on building a comprehensive European port strategy emphasises the importance of the Global Gateway as an alternative to the BRI and its potential to support maritime industry, including by creating a network of ports.¹⁶ The European Parliament position thus supports the Global Gateway as a means to cooperate with the US and G7, but compete with, resist or provide alternatives to China.

Governance is another recurring theme in Parliament resolutions mentioning the Global Gateway. In its resolution of 6 July 2022 on the EU and the defence of multilateralism, Parliament states that the Global Gateway presents an opportunity to define a common agenda, adding value to the 'multilateral approach to challenges and crises in the world and reinforces the leveraging ability of

¹¹ European Commission, [Global Gateway: First meeting of the Global Gateway Board](#), 2022.

¹² European Parliament, [resolution of 17 February 2022](#), on the implementation of the common foreign and security policy – annual report 2021, 2022.

¹³ European Parliament, [recommendation of 13 December 2023](#) to the Council, the Commission and the Vice President of the Commission / High Representative of the Union for Foreign Affairs and Security Policy concerning EU-US relations, 2023.

¹⁴ European Parliament, [recommendation of 13 December 2023](#), to the Council and the Vice-President of the Commission / High Representative of the Union for Foreign Affairs and Security Policy concerning EU-China relations, 2023.

¹⁵ European Parliament, [resolution of 17 January 2024](#) on the security and defence implications of China's influence on critical infrastructure in the European Union, 2024.

¹⁶ European Parliament, [resolution of 17 January 2024](#) on building a comprehensive European port strategy, 2024.

the EU and its Member States, including in multilateral fora'.¹⁷ Furthermore, in a resolution adopted on 24 November 2022 on the future of European financial architecture for development, Members called on the Commission to work on the effective governance of the Global Gateway and urges it to provide additional information on the calculation of the leverage ratio for Global Gateway investments.¹⁸ Finally, in a resolution of 12 December 2023 on the Implementation of the Neighbourhood, Development and International Cooperation Instrument Global Europe, Parliament stresses the need for parliamentary involvement and scrutiny, as well as consultation with the business sector and CSOs concerning the Global Gateway, and calls on the Commission to clarify the governance framework, including Parliament's scrutiny role and to provide a clear definition of a Global Gateway, and for the strategy to be implemented faster.¹⁹

Several resolutions connect the Global Gateway to the issue of development cooperation. In its resolution of 13 December 2023 on EU development cooperation to enhance access to education and training in developing countries, Parliament states that the Global Gateway 'should be accompanied by follow-up and monitoring mechanisms to measure the impact'.²⁰ The Parliament's resolution of 17 January 2024, on EU development cooperation in support of access to energy in developing countries, urges the Commission to increase the number of programmes under the Global Gateway that prioritise basic access to electricity and clean cooking in countries in need.²¹

Finally, apart from cooperation with the US and G7, Parliament resolutions have urged the EU to use the Global Gateway as a vehicle to enhance cooperation with Taiwan, Japan and India. In a resolution of 15 September 2022, on the situation in the Taiwan Strait, Members supported the consideration of 'connectivity projects with Pacific island states and co-investment in partnerships between the EU's Global Gateway and Taiwan's New Southbound Policy'.²² In its resolution of 13 December 2023 on EU-Japan relations, Parliament 'emphasises the importance of the Global Gateway Initiative and the significance of cooperating with Japan to make sure that the Global Gateway is well coordinated with the G7 Partnership for Global Infrastructure and Investment'.²³ In its recommendation of 17 January 2024 on EU-India relations, Parliament welcomed the EU-India Connectivity Partnership as a reinforcement of the Global Gateway.²⁴

Expert views

The following section provides an overview of expert views on the Global Gateway, through a compilation of summaries of published works on the subject. The experts and critical uncertainties identified helped shape the scenarios presented in the next section.

¹⁷ European Parliament, [resolution of 6 July 2022](#) on the EU and the defence of multilateralism, 2022.

¹⁸ European Parliament, [resolution of 24 November 2022](#) on the future European Financial Architecture for Development, 2022.

¹⁹ European Parliament, [resolution of 12 December 2023](#) on the implementation of the Neighbourhood, Development and International Cooperation Instrument – Global Europe, 2023.

²⁰ European Parliament, [resolution of 13 December 2023](#) on EU development cooperation to enhance access to education and training in developing countries, 2023.

²¹ European Parliament, [resolution of 17 January 2024](#) on EU development cooperation in support of access to energy in developing countries, 2024.

²² European Parliament, [resolution of 15 September 2022](#) on the situation in the Strait of Taiwan, 2022.

²³ European Parliament, [resolution of 13 December 2023](#) on EU-Japan relations, 2023.

²⁴ European Parliament, [recommendation of 17 January 2024](#) to the Council, Commission and the Vice-President of the Commission / High Representative of the Union for Foreign Affairs and Security Policy concerning EU-India relations, 2024.

The **Mercator Institute for China Studies (MERICS)** think-tank writes that the EU already spends almost as much in grants as China spends on loans for BRI projects, but that the BRI enjoys more effective branding.²⁵ If the EU is to do better, then projects will have to be branded under 'Team Europe' instead of individual Member States in the future. While this will be challenging, the institute welcomes the Global Gateway as a step in the right direction, as the EU has begun to recognise the geopolitical relevance of global connectivity investment. The think-tank considers the Global Gateway should not measure itself against the BRI, but rather focus on and take the time to implement a few core projects that promote the EU's values and interests and involve local actors.²⁶

The **Polish Institute of International Affairs (PISM)** considers the Global Gateway presents an opportunity for the EU to improve the visibility of its activities and enhance its image through more effective branding and communication in its neighbourhood.²⁷ It would also enable better exchange of information on projects between the EU and US at G7 level. However, the institute doubts that EU guarantees can attract the desired volume of private investment and also sees financial limits for public institutions burdened by the post-pandemic economic slowdown.

The **European Centre for Development Policy Management (ECDPM)** argues that the Global Gateway should focus less on criticising China and more on partner country needs.²⁸ The centre also suggests that the policy direction should seek greater buy-in from Member States, a better balance between self-interest and development goals, open engagement with stakeholders, and more concerted coordination between EU institutions and the EEAS. It concludes that the Global Gateway should include greater dialogue with partner countries and EU delegation involvement, to ensure that projects are tailored to local needs and not planned centrally in Brussels.

China Dialogue likewise posits that for the Global Gateway to succeed, it must respond to the self-defined priorities of African partner countries and needs to engage them in project design.²⁹

Non-governmental organisation (NGO) networks **Counter Balance and the European Network on Debt and Development (Eurodad)** criticise the Global Gateway a lack of responsiveness to the urgent transition to sustainable economies, to address climate change and providing basic needs.³⁰ They argue that the strategy lacks fresh money and transparency and doubt it can leverage private investment. The NGO networks also fear the strategy will divert funding from development goals towards private sector interests and geopolitical objectives.

According to climate change think-tank **E3G**, the Global Gateway could provide the best offer among competing infrastructure investments, if it ensures timely and easily accessible funding flows to projects with the highest impact among partners, guided by a dedicated interinstitutional team.³¹

²⁵ Jacob Mardell, [Global Gateway – the European Union's new connectivity strategy](#), Mercator Institute for China Studies (MERICS), 2021.

²⁶ Francesca Ghiretti and Grzegorz Stec, [Global Gateway: playing “catch-up” with China or a chance for change?](#), Mercator Institute for China Studies (MERICS), 2022.

²⁷ Elżbieta Kaca, [The EU's Global Gateway Strategy: Opportunities and Challenges](#), Polish Institute of International Affairs (PISM), 2022.

²⁸ Chloe Teevan and San Bilal, [The Global Gateway at two: Implementing EU strategic ambitions](#), European Centre for Development Policy Management (ECDPM), 2023.

²⁹ James Norris, [For its Global Gateway to succeed, the EU must learn the art of partnership](#), China Dialogue, 2022.

³⁰ Farwa Sial and Xavier Sol, [The Emperor's New Clothes: What's new about the EU's Global Gateway?](#), Counter Balance and the European network on debt and development (Eurodad), 2022.

³¹ E3G, ['Global Gateway': the EU Green Deal goes global](#), 2021.

Early research by India's **Observer Research Foundation (ORF)** concludes that the effectiveness of the 'Team Europe' approach is debatable, as it relies on individual Member States buying into each specific proposal, while also identifying the Global Gateway as an important step towards using infrastructure resources in a geopolitical context, as well as a more active EU in international affairs.³² More recent ORF research describes the Global Gateway as a conduit for the resurgence of European activity in Africa and for the creation of resilient value chains in competition with China.³³

The US-based **Center for Global Development** has doubts about the Global Gateway budget, arguing that it merely repackages existing funds and calling the assumptions regarding attracting private capital 'highly questionable'.³⁴

Conversely, experts at **Bruegel** argue that critics claiming that the Global Gateway is simply repackaging of existing instruments 'miss the point', because 'what Europe really needs is not new resources, but to use existing ones more strategically'.³⁵ They argue that while the EU and EU countries have provided a greater financial contribution to developing countries than China, this funding has suffered from fragmentation. They also suggest that EU guarantees' ability to leverage private investment seem reasonable.

The **Centre for European Policy Studies (CEPS)** writes that the Global Gateway must differentiate itself from competing offers and address what it sees as its dwindling credibility, which requires strong international leadership and commitment to multilateral cooperation.³⁶ It concludes that the Global Gateway offers an excellent opportunity for the EU to rehabilitate the EU's international reputation as a neutral and honest broker in international engagements.

The **Royal Institute Elcano** comments that policymakers should consider how the Global Gateway can help the EU to project geopolitical influence in the longer term.³⁷ It urges greater integration of the need for critical raw materials and rare earths in the strategy and a clearer link between infrastructure projects and EU companies.

The **Clingendael Institute** considers the Global Gateway an important milestone for the EU, as it extends industrial policy internationally to promote the EU's agenda and interests abroad.³⁸ The institute suggests a country-to-country bottom-up approach to projects as the most efficient modus operandi for the Global Gateway.

The **Egmont Institute** sees the Global Gateway as a tool to maintain a world order shaken by Russia's invasion of Ukraine. It urges the EU to invest now, especially in countries with critical raw material sources.³⁹ It also considers that the Global Gateway has the potential to become a truly transformative force in favour of the green transition, and that that this will depend on its capacity

³² Raisina Debates, [The EU Global Gateway: The narrow path between relevance and invisibility](#), Observer Research Foundation (ORF), 2021.

³³ Prithvi Gupta, [The Global Gateway in Africa: Europe's foray into infrastructure diplomacy](#), Observer Research Foundation (ORF), 2024; Prithvi Gupta, [Global Gateway: EU's 'infrastructure-for-energy security' bet](#), Observer Research Foundation (ORF), 2024.

³⁴ Mikaela Gavass and Samuel Pleeck, [The EU's Global Gateway Is Not a Groundbreaking Plan for Domination in Global Infrastructure](#), Center for Global Development, 2021.

³⁵ Simone Tagliapietra, [The Global Gateway: a real step towards a stronger Europe in the world?](#), Bruegel, 2021.

³⁶ Fanny Sauvignon and Stefania Benaglia, [An EU global gateway ... to what?](#), Centre for European Policy Studies (CEPS), 2023.

³⁷ Raquel Jorge Ricart and Miguel Otero Iglesias, [The Global Gateway: it's not the money, it's the strategy](#), Royal Institute Elcano, 2022.

³⁸ Maaïke Okano-Heijmans, Global Gateway: [Positioning Europe for a Sustainable Future](#), Clingendael Institute, 2022.

³⁹ Sven Biscop, [The World Order Holds – For Now](#), Egmont Institute, 2022.

to consider all stakeholders' interests and its ability to establish equitable partnerships.⁴⁰ Another paper by an Egmont Institute analyst finds that the Global Gateway will need to thoroughly integrate strategic communication if it is to preserve and promote its reputation in the face of potential discrediting narratives and disinformation.⁴¹

The US-based **Council on Foreign Relations** warns that 'unless B3W and Global Gateway coordinate their approaches, neither will meet its full potential'.⁴²

Likewise, the Australia-based **Lowy Institute** sees closer cooperation with the US on the G7's 'Build Back Better' initiative as a possibility.⁴³

The US-based **Wilson Center** considers the Global Gateway a 'win' for European industrial policy and geopolitical competitiveness.⁴⁴ It suggests that connectivity partnerships with Japan and India should be followed up with further EU-US cooperation, particularly after the Russian invasion of Ukraine and the subsequent need for EU energy supply diversification and more resilient green energy and tech supply chains.

The **European Institute for Asian Studies (EIAS)** suggests that the EU will need to develop country-specific solutions to avoid speculation among partner countries that it is interfering in their domestic affairs.⁴⁵ Awareness of the initiatives must be actively promoted in partner countries. It also suggests that the EU should advance Global Gateway projects in the Indo-Pacific, potentially through cooperation with China, Japan and other actors active in the region.⁴⁶

The **German Development Institute (DIE)** states that there is no reason to doubt the Global Gateway will be adequately financed.⁴⁷ It argues the Global Gateway presents considerable continuity and thematic overlap with existing strategic frameworks for engaging with Africa and the EU neighbourhood, and appears to return to EU aid focused on infrastructure and emphasising political neutrality. They nonetheless suggest that the Global Gateway heralds a new paradigm for an EU development policy defined more by strategic interests than core development principles, requiring measures to safeguard those principles.

The **Konrad Adenauer Stiftung (KAS)** notes the challenges for the Global Gateway to combine its high governance standards, strategic content and many partners with limited financial means.⁴⁸ However, it posits that an alternative to the BRI is urgent, that the initiative deserves full support from Member States and that implementation should be accelerated.

⁴⁰ Marie Dejonghe, [Unlocking Global Gateway towards the Green Transition](#), Egmont Institute, 2023.

⁴¹ Bernard Siman, Strategic Communication, [A Key to The Success of The EU's Global Gateway](#), EuroMeSCo, 2024.

⁴² David Sacks, [Europe's Global Gateway Plans To Counter China, But Questions Remain](#), Council on Foreign Relations, 2021.

⁴³ Mateo Szlapek-Sewillo, [Europe is finally getting serious about China](#), The Lowy Institute, 2021.

⁴⁴ Simone Tagliapietra, [The Global Gateway: An Overview](#), Wilson Center, 2022.

⁴⁵ Walter Brenno Colnaghi, [Stairway to Heaven or Highway to Hell? The EU's Global Gateway and Expanding Economic Statecraft](#), European Institute for Asian Studies (EIAS), 2021.

⁴⁶ Dilara Kasikci, [Unveiling the EU's Global Gateway Strategy: Expanding Indo-Pacific Infrastructure Landscapes](#), European Institute for Asian Studies (EIAS), 2023.

⁴⁷ Mark Furness and Niels Keijzer, [Europe's Global Gateway: A New Geostrategic Framework for Development Policy?](#), German Development Institute (DIE), 2022.

⁴⁸ Olaf Wientzek, Jonas Nitschke, Louis Bout, ["Global Gateway" slowly gathers momentum](#), Konrad Adenauer Stiftung (KAS), 2023.

The **Friedrich Naumann Foundation** expresses confidence that the Global Gateway will reinforce EU ties across the Mediterranean while promoting connectivity, the fight against climate change and human rights.⁴⁹

The **European Council on Foreign Relations (ECFR)** likewise argues that the EU's southern neighbourhood should be a key focus of the Global Gateway strategy, but that so far little investment has been directed to the region.⁵⁰ The ECFR concludes that the Global Gateway's use of grants instead of loans is central to making it more attractive than offers from China.

The **Swedish Institute for Security & Development Policy (ISDP)** describes the Global Gateway as an opportunity to provide a strong alternative to the BRI and for the EU to build tighter economic and political ties with partners, which may increase the EU's strategic autonomy.⁵¹ It states that, as it may help export EU industrial and competition policies, it could stimulate economic growth in the EU and expand its global regulatory influence.

In **summary**, MERICS and Bruegel agree that the EU spends more on development, but that this funding suffers from fragmentation compared to a BRI that enjoys better branding. The PISM suggests the Global Gateway presents an opportunity to improve visibility of the EU's activities and enhance its branding. CEPS suggests that the Global Gateway should be differentiated from competing offers and hopes it may help rehabilitate the EU's international reputation.

MERICS and the ECDPM suggest that the Global Gateway should not focus on rivalling China. Nonetheless, KAS and ISDP welcome it as an alternative to the BRI. US-based think-tanks the Council on Foreign Relations, the Lowy Institute and the Wilson Center all emphasise the importance of the Global Gateway aligning with the initiatives of the US and G7. The EIAS also sees cooperation with Japan, China and other actors in the Indo-Pacific as relevant.

The PISM, Counter Balance and Eurodad, and the Center for Global Development doubt the Global Gateway will attract the intended amount of private investment, while also accusing the strategy of simply repackaging existing funds. Conversely, Bruegel argues that existing funds should be repackaged in a more coherent strategy and considers the EU's expectations on leveraging private investment to be reasonable. Likewise, the DIE states that there is no reason to doubt that the Global Gateway will be adequately financed.

The MERICS and ORF welcome the Global Gateway as a recognition of the geopolitical relevance of global connectivity investment. The Royal Institute Elcano suggests that policymakers should consider how the Global Gateway can help project the EU's geopolitical influence long term, calling for the integration of critical raw materials needs. The Egmont Institute likewise emphasises the importance of investing in critical raw materials. The Clingendael Institute considers the EU's projection of its agenda and interests abroad a 'milestone'.

However, the ECDPM suggests there should be a balance between self-interest and development goals and the DIE likewise suggests that measures should be taken to safeguard development principles, as the Global Gateway veers more towards strategic interests. Counter Balance and Eurodad also fear that the Global Gateway will divert funding from development goals towards

⁴⁹ Claudia Luna Palencia, [The Global Gateway will strengthen ties between the two shores](#), Friedrich Naumann Foundation, 2023.

⁵⁰ Alberto Rizzi and Arturo Varvelli, [Opening the Global Gateway: Why the EU should invest more in the southern neighbourhood](#), European Council on Foreign Relations (ECFR), 2023.

⁵¹ Jagannath P. Panda, [EU's global gateway strategy and building a global consensus vis-a-vis BRI](#), Institute for Security & Development Policy, 2022.

private sector and geopolitical interests. The ECDPM and China Dialogue argue that the Global Gateway should follow the needs of partner countries and engage them in dialogue.

From the literature surveyed above, **10 critical uncertainties** that may influence the success or failure of the Global Gateway were identified, the:

- ability to achieve EU geopolitical goals;
- ability to achieve international sustainable development objectives;
- ability to compete with the BRI;
- ability to find synergies with other countries' infrastructure initiatives;
- ability to involve business, civil society, experts and other stakeholders;
- ability to leverage private investment;
- level of buy-in from Member States;
- level of cohesiveness of coordination under the Team Europe approach;
- level of communication and awareness of the strategy in partner countries;
- responsiveness to partner countries' priorities.

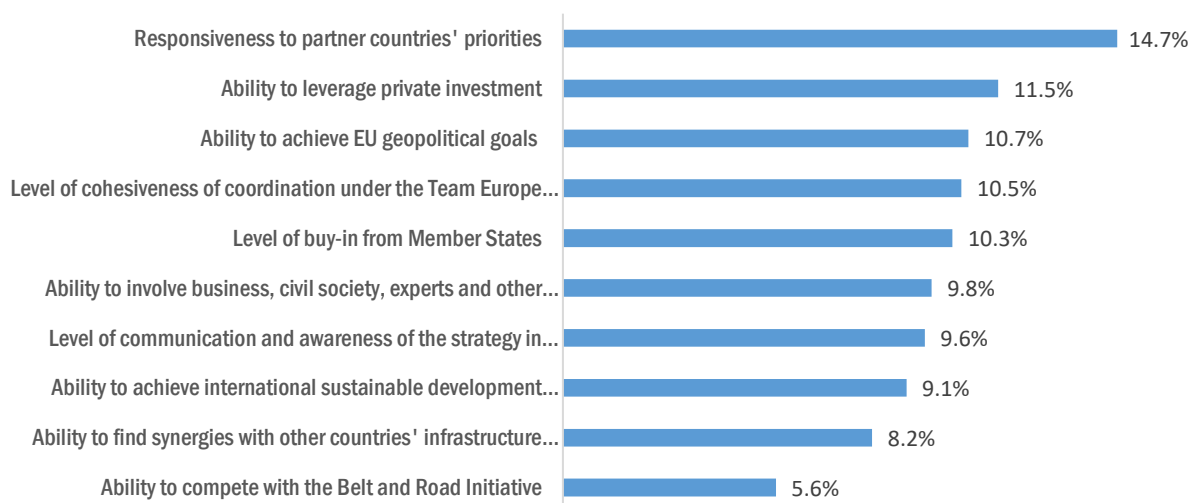
These critical uncertainties return to help shape the Global Gateway 2030 scenarios presented in the following section.

Scenarios for 2030

Critical uncertainties

Critical uncertainties are major unpredictable trends or driving forces whose outcomes are highly uncertain but that can have a big impact on the ecosystem. The experts surveyed were asked to rank the critical uncertainties identified from the literature by ranking the most critical and uncertain highest. The percentages in the resulting ranking (Figure 5) indicate the share of points (10 for highest ranked, 1 for lowest) that each listed critical uncertainty received, out of the total points. The results indicate that experts consider the Global Gateway should focus less on competing with the BRI and more on responding to the needs of partner countries. The two highest ranked critical uncertainties were taken to become the two axes of the four scenarios (see Figure 6), while the others all recur as elements within the scenarios presented in the next sections.

Figure 5 – Expert ranking of critical uncertainties for the Global Gateway



Source: 30 expert contributions to an EPRS survey on the future of the Global Gateway conducted in February 2024.

In addition to the critical uncertainties above, experts noted a further 15 critical uncertainties:

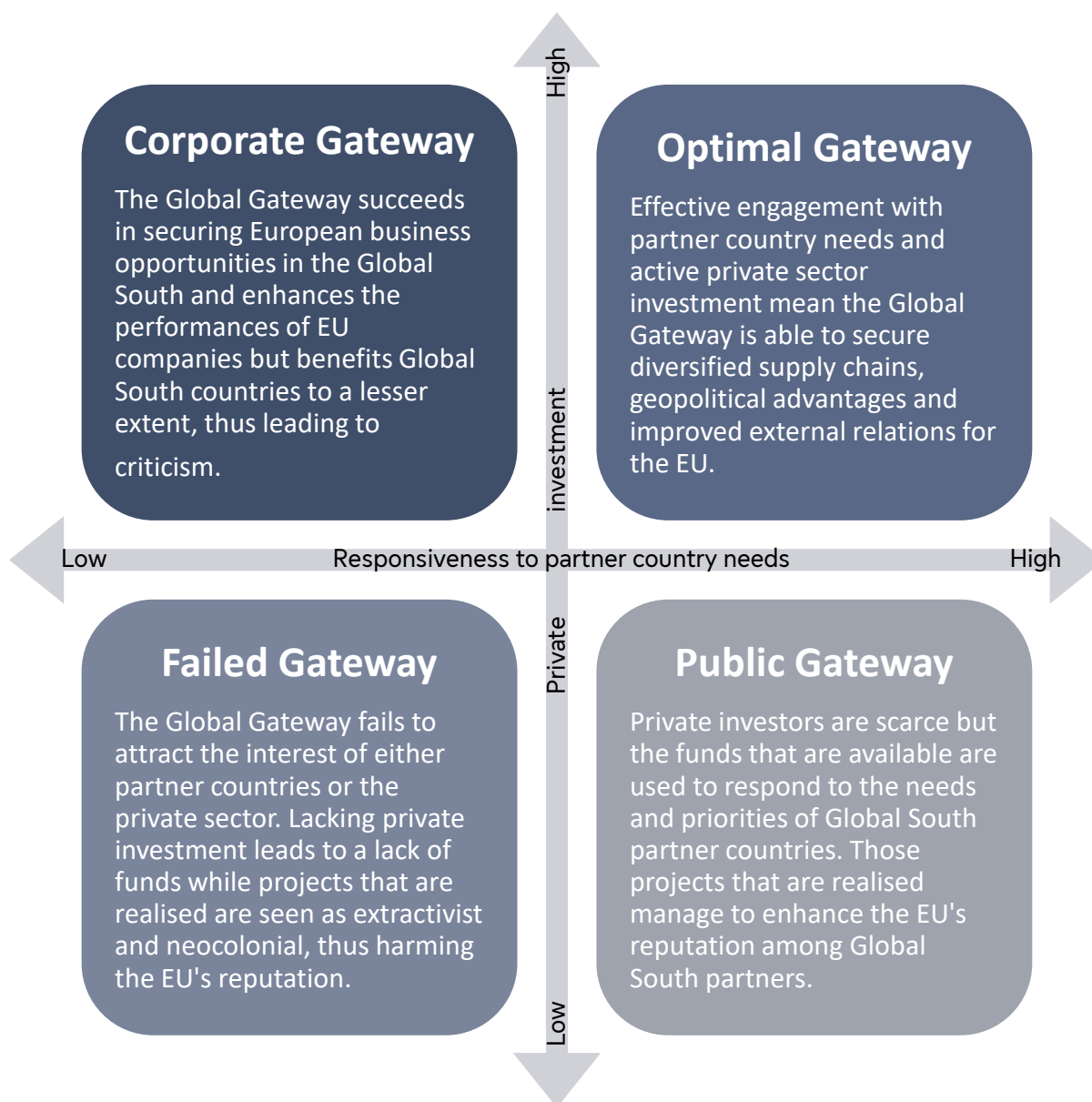
- Outcome of the 2024 US elections and impact of a potential Trump re-election;
- Major geopolitical disturbances, such as an invasion of Taiwan;
- Ability to establish truly equal partnerships with target countries;
- Ability to find synergies with the BRI on environmental and climate goals;
- Potential global economic crisis with budget implications for development agencies;
- Continuity of war in Ukraine, Gaza, and other sources of instability and budget priorities;
- Growth of India as technological powerhouse;
- Level of investment in EU delegations to effectively support the Global Gateway;
- Continued EU leadership on developmental and humanitarian issues;
- Changes in China's global investment strategy;
- State of global green technology competition;
- EU economic growth and budget;
- Development of US-China relations;
- Level of implementation and EU oversight of ongoing projects;
- Outcome of EU Member State and European Parliament elections.

These critical uncertainties were also integrated into the following scenarios.

Scenario overview

The following scenarios were created using input from experts surveyed who have written on the Global Gateway. The two axes represent the two primary critical uncertainties identified that could impact the future of the Global Gateway (see Figure 5). The 'optimal gateway' scenario is based on the hopes shared by the experts, while the 'failed gateway' scenario is based on their fears. The other two scenarios follow the experts' expectations as a middle way between the best and worst case scenarios.

Figure 6 – Global Gateway 2030 scenarios



Source: Scenarios constructed from 30 expert contributions to an EPRS survey on the future of the Global Gateway conducted in February 2024.

The following scenario narratives were created by summarising the hopes, fears and expectations expressed by the 30 experts surveyed, by structuring those summaries thematically along the

10 critical uncertainties and turning those lists into narratives through generative artificial intelligence, stories which were then edited and structured by internal and external developments.

Optimal gateway

By 2030, effective engagement with partner country needs and active private sector investment mean the Global Gateway is able to secure diversified supply chains, geopolitical advantage and improved external relations for the EU.

Internal development: In this scenario, the Global Gateway's success is partly driven by robust private sector participation, which emerges as a pivotal catalyst for scaling up finance and driving project implementation. Surpassing the initial investment target of €300 billion, both the EU and its Member States exceed expectations, mobilising private finance in key sectors essential for the green transition. Addressing gaps in financing modes and incentivising private sector involvement, the Global Gateway not only unlocks new avenues for economic growth but also fortifies the EU's business opportunities, prosperity, and economic security. Moreover, the initiative catalyses cohesion within 'Team Europe', amplifying coordination among EU actors and projecting the EU as a unified entity. With reinforced expertise and a concerted focus on key areas such as private sector development, energy, transport, and digital transformation, and thanks to sufficient investment in their capacities, EU delegations emerge as adept stewards of Global Gateway implementation. Despite some gains for political parties favouring national action over European cooperation, Member States' commitment further reinforces the initiative, with substantial national budgets earmarked for its realisation. Strong ownership and collaboration between economic and foreign ministries at the Member State level facilitate the formulation of engagement strategies, ensuring a cohesive approach towards realising the objectives of the Global Gateway. Inclusive stakeholder involvement is likewise paramount to the initiative's success, with small and medium-sized companies integrated into projects on the ground. Robust consultation mechanisms, spanning the private sector, policy experts, and civil society facilitate dialogue.

External engagement: The cornerstone of the Global Gateway's success furthermore lies in its meticulous engagement with the genuine needs of partner countries. Global South governments, parliaments and civil society are equals in project design and implementation. Through a comprehensive framework, the EU forges strategic alliances with nations previously overlooked, deploying digital-related projects across countries usually receiving less EU support. Countries in which the Global Gateway can make a difference are clearly prioritised, strengthening the EU's strategic partnerships. In tandem with economic imperatives, the Global Gateway is instrumental in advancing geopolitical goals, particularly in securing critical raw materials vital for clean technologies. By fostering diversified and resilient supply chains, the EU translates its economic weight into a strategic advantage, enhancing geopolitical influence and increasing its strategic autonomy on the global stage. Clear and transparent communication is pivotal in garnering support and fostering awareness of the Global Gateway's objectives and achievements. Monthly updates disseminated through local and regional media channels provide stakeholders with a comprehensive understanding of progress, while a robust public diplomacy strategy led by EU and 'Team Europe' delegations amplifies the initiative's global footprint. Aligned with the United Nations Agenda 2030, the Global Gateway's sustainable development objectives include concrete projects delivering mutually beneficial outcomes. The Global Gateway succeeds in fostering development, reducing poverty and enhancing human welfare. Projects are aligned with the initiatives of likeminded partners (including the US, United Kingdom, Japan, Australia, and G7), thus reinforcing the EU's international partnerships. Furthermore, the initiative's success serves as a counterbalance to China's BRI, with high-visibility projects showcasing qualitative differences and competitive

advantages, such as adherence to higher standards of rule of law and sustainability, including real debt sustainability. The Global Gateway has nevertheless found synergies with the BRI, on ways to jointly tackle environmental and climate issues and as China partly adjusts its global investment strategy to better complement the Global Gateway. As US-China relations improve, so do opportunities for the Global Gateway to cooperate and find synergies with both powers. The Global Gateway represents the EU's primary external tool for engaging with countries outside the G7, bridging gaps in relations with the Global South. India, having emerged as a technological powerhouse, has become another key Global Gateway partner. Appreciated as a meaningful vehicle for fostering development, countering illegal migration, and spreading EU values, the initiative stands at the forefront of collaboration and progress in an increasingly interconnected world.

Failed gateway

By 2030, the Global Gateway fails to attract the interest of either partner countries or the private sector. Insufficient private investment leads to a lack of funds while projects that are realised are seen as extractivist and neocolonial, thus harming the EU's reputation.

Internal development: In this scenario, the absence of critical private investment is a central challenge to the Global Gateway's success. With the €300 billion goal unmet and available funds slow to materialise, the Global Gateway is unable to catalyse its promised transformative change. Internally, the EU grapples with internal disagreement and fragmentation, as discord among institutions and Member States impedes progress and undermines cohesion. The 'Team Europe' approach, intended to foster synergies, instead breeds confusion and inefficiency, exacerbating the Global Gateway's already complicated institutional architecture. A lack of Member State ownership of Global Gateway initiatives, viewed as the exclusive domain of the Commission, reflects an emphasis on national rather than common European action and reduces motivation to provide funds. Stakeholder involvement remains wholly inadequate as insufficient consultation impedes transparency. Civil society and non-business voices are sidelined, as the initiative becomes a series of investor forums devoid of meaningful dialogue or inclusion. Likewise, EU delegations lack the resources to meaningfully engage in stakeholder engagement, attracting private investment and disbursing EU funds.

External engagement: At the heart of the Global Gateway's failure lies a disconnection with partner countries' priorities. Having raised false hopes in the Global South, the Global Gateway is seen as a collection of empty promises. Viewed as a series of unjust partnerships with an extractivist or even neocolonial agenda, the initiative fuels resentment and strains relations with key partners in Africa and beyond. The imposition of high standards further alienates governments in the Global South and make the Chinese alternative more attractive. Low project uptake means funds, although limited, remain unused, memorandums of understanding remain unfulfilled and projects either fail to materialise or are only partly realised. Geopolitically, Europe finds itself at a disadvantage as it fails to secure access to critical raw materials crucial to the green and digital transitions and cedes ground to competitors, particularly China. Global disturbances, including continuing war in Ukraine and Gaza, a global economic crisis and escalating tensions in the Taiwan Strait, divert attention and funds away from the Global Gateway. Innovative European digital projects are executed by non-European entities such as US big tech firms and Chinese telecommunications companies, further eroding Europe's foothold in critical sectors. Communications efforts, marred by an excess of priorities and a lack of coherence, fail to convey a clear strategy or impact the perception of the EU's role in the world. As a mere rebranding exercise, the Global Gateway narrative is largely forgotten by the end of its first political cycle. Sustainable development objectives are overshadowed by commercial interests and the need for critical raw materials. Poor environmental, social and governance

standards, human rights violations and environmental damage related to some projects tarnish the EU's reputation as a champion of global values, further eroding its credibility on the world stage. A newly elected Trump administration in Washington shows little interest in partnering with the Global Gateway as it prefers to work unilaterally. Synergies with likeminded partners furthermore falter as projects diverge from shared objectives and duplicate efforts, straining international partnerships and diminishing the EU's standing.

Corporate gateway

By 2030, the Global Gateway succeeds in securing European business opportunities in the Global South and enhances the performances of EU companies, but benefits Global South countries to a lesser extent, thus leading to criticism.

Internal development: In this scenario, the Global Gateway achieves great commercial success through the robust participation of EU companies. This symbiotic relationship between the Global Gateway and EU enterprises underscores the initiative's role as a catalyst for economic expansion and international competitiveness. As the Global Gateway advances Europe's economic growth, more funding is made available. Communications efforts are refined to articulate clearer objectives and cultivate a distinct brand image, positioning the Global Gateway as a beacon of transparency and accountability amidst authoritarian alternatives. Challenges however persist, particularly in reconciling competing and overlapping infrastructure schemes, which dilute the EU's impact in partner countries.

External engagement: In contrast to the initiative's commercial success, partner countries in the Global South criticise Global Gateway initiatives for securing European business opportunities while falling short on delivering commensurate local benefits. This asymmetry underscores a fundamental imbalance in the distribution of gains, challenging the initiative's legitimacy. African partners accuse the EU of extractivism, rather than a commitment of helping developing nations move up the value chain. Geopolitically, the Global Gateway assumes a prominent role in the EU's increased strategic external action. Emphasising cooperation with key partner countries, particularly those demonstrating economic promise, the initiative fosters deeper ties and enhances the EU's expertise and presence in strategic regions such as Africa and Central Asia. The EU invests heavily in EU delegations throughout the Global South, which act as matchmakers between European companies and host governments to achieve profitable Global Gateway projects. Changes in China's global investment strategy open up opportunities for European investment in critical raw materials. The EU's geopolitical objectives advance by securing diversified supply chains, advancing Europe's competitiveness in global green technologies and offering an alternative to the BRI. As more projects remain in the planning phase, a stronger rollout of resources and a more realistic adjustment of expectations are under way.

Public gateway

By 2030, private investors are scarce, but the funds that are available are used to respond to the needs and priorities of Global South partner countries. Those projects that are realised enhance the EU's reputation among Global South partners.

Internal development: In this scenario, private investment falls significantly short of expectations, but the Global Gateway benefits from a well-functioning 'Team Europe' approach. Enhanced Member State buy-in underscores the Commission's need to secure broader national government support. Stakeholder involvement, facilitated through business advisory groups and civil society platforms, enriches the Global Gateway's evolving strategy with valuable insights and perspectives.

This consultative approach ensures that the initiative remains responsive to stakeholder needs and concerns, enhancing its relevance and effectiveness. True equal partnerships are established with partner countries, and help demonstrate the EU's global leadership on developmental and humanitarian issues.

External engagement: The EU effectively engages with partner countries' real needs through the Global Gateway and cultivates improved relations with the developing world. Sustainable development objectives take centre stage, with the Global Gateway serving as the EU's principal instrument for supporting development goals while safeguarding access to critical transition minerals. While many projects are successfully implemented, the EU's image fails to receive a significant boost, owing to competing initiatives and partnerships with other global players. In competition with China's BRI, the Global Gateway emerges as a credible alternative for Global South partner countries, although does not out-compete its Chinese counterpart. The re-election of former president Trump sees the American infrastructure initiative sidelined, making the Global Gateway the world's main infrastructure initiative, next to the BRI. However, as a technological powerhouse, India fills part of the vacuum left by the US, mounting its own infrastructure initiative and providing ground for cooperation with the Global Gateway. Through effective dialogue, the Global Gateway is likewise able to find synergies with the BRI on environmental and climate goals. This provides a positive example of cooperation in the face of deteriorating US-China relations. However, continuing war in Ukraine and Gaza, escalating tensions in the Taiwan Strait and a global economic crisis divert attention and funding away from the Global Gateway.

Policy considerations

The scenarios included in this report may not emerge as presented. The Global Gateway could produce a mix of elements included among them. The axes of the scenario framework (partner country needs and private sector investment) prioritised above other critical uncertainties by the experts surveyed, deserve particular attention. They indicate that the Global Gateway cannot succeed without an effective response to partner countries' priorities and attracting and leveraging private capital. The report presents scenarios in which success in both, one, or none of these priority areas is attained. Policymakers' influence on these two fronts is critical to the Global Gateway's success. Flexibility in implementation is also needed, as unforeseen events can overtake long-term planning. Consideration of the advice provided by the experts surveyed could help ensure that the initiative develops in the desired direction, avoiding the worst-case 'Failed Gateway' scenario and achieving as much as possible of the best-case 'optimal gateway' scenario, including on:

- **Communication:** Experts surveyed suggest policymakers could simplify the messaging around the Global Gateway and make good use of public diplomacy to increase awareness of the initiative among partner countries and in the EU. Policymakers could also increase meaningful dialogue with partners in the Global South, as well as EU citizens, to avoid building expectations the EU cannot match. Policymakers could furthermore focus communication on results and concluded agreements rather than targets. The narrative could become more about dialogue and incentives, and less about China. At the same time, experts warn that rebranding of the initiative should be proportionate.
- **Strategy:** Experts surveyed would advise policymakers to identify flagship countries to be prioritised as key partners for Global Gateway projects. The Global Gateway's geopolitical and strategic priorities should be articulated and determine the choice of key partner countries. Policymakers could furthermore either focus on bigger projects

or start small and scale up, prioritising quality over quantity. The experts surveyed furthermore suggest that policymakers could also envisage future gateway sectors, such as undersea, space and cyber.

- **Consultation:** According to the experts surveyed, policymakers could coordinate with the World Bank and adopt its best practice. They could also use the Global Gateway's Business Advisory Group and Civil Society Platform, as well as enhancing the role of think-tanks in Global Gateway advisory bodies. Policymakers could further enhance the European Parliament's scrutiny role to improve accountability. Experts furthermore argue that a better understanding of local needs in partner countries could be encouraged.
- **Critical raw materials:** Experts urge policymakers to ensure responsible sourcing and high-quality practice to access the most urgently needed critical minerals, notably for batteries. In doing so, they stress that policymakers could place emerging countries' desire to move up the value chain at the centre of the EU's approach.
- **Evaluation:** The experts surveyed advise that policymakers could map European sectoral strengths by Member State. This overview would better equip European actors to match their offer against partner countries' needs. Policymakers could boost consideration of the political situation, geopolitics and the impact of projects on peace and conflict in their design. Policymakers could also ensure projects fully enhance community welfare and the environment and ensure that they do no harm. Experts surveyed also suggest that policymakers could command a comprehensive review and joint evaluation of the Global Gateway by 2028, mapping local impact and project results.
- **Governance capacity:** Experts surveyed suggest that policymakers could develop new financial instruments to deliver on the scale needed by partner countries and increase the speed at which funding is disbursed. Policymakers could also integrate geopolitical and diplomatic expertise with sectoral, connectivity or development expertise within the governance structure. Policymakers could provide training on the Global Gateway for EU delegations and link the Global Gateway more closely to the EEAS.
- **International cooperation:** The experts surveyed argue that policymakers could deepen cooperation and dialogue between the Global Gateway and other infrastructure schemes (from the G7, US, Japan, India, Australia, Association of South-east Asian Nations (ASEAN) etc.) and provide some form of coordination with China, to avoid project duplication.

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The EU Global Gateway, a €300 billion infrastructure investment strategy launched in December 2021, seeks to build sustainable and secure connections in the digital, energy and transport sectors and boost Europe's competitiveness and supply chain security across the world. What might the strategy look like in future? This paper presents four possible scenarios for the Global Gateway in 2030, based on survey responses from 30 policy experts: 'optimal gateway', 'failed gateway', 'corporate gateway' and 'public gateway'.

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