

The Government-Platform Collaboration Playbook

From Digitalisation to
Platform-Enabled Governance



An Implementation Guide for Government
Officials and Policymakers

Based on multi-country research across
the Philippines, Indonesia, and Malaysia

First Edition:
2026

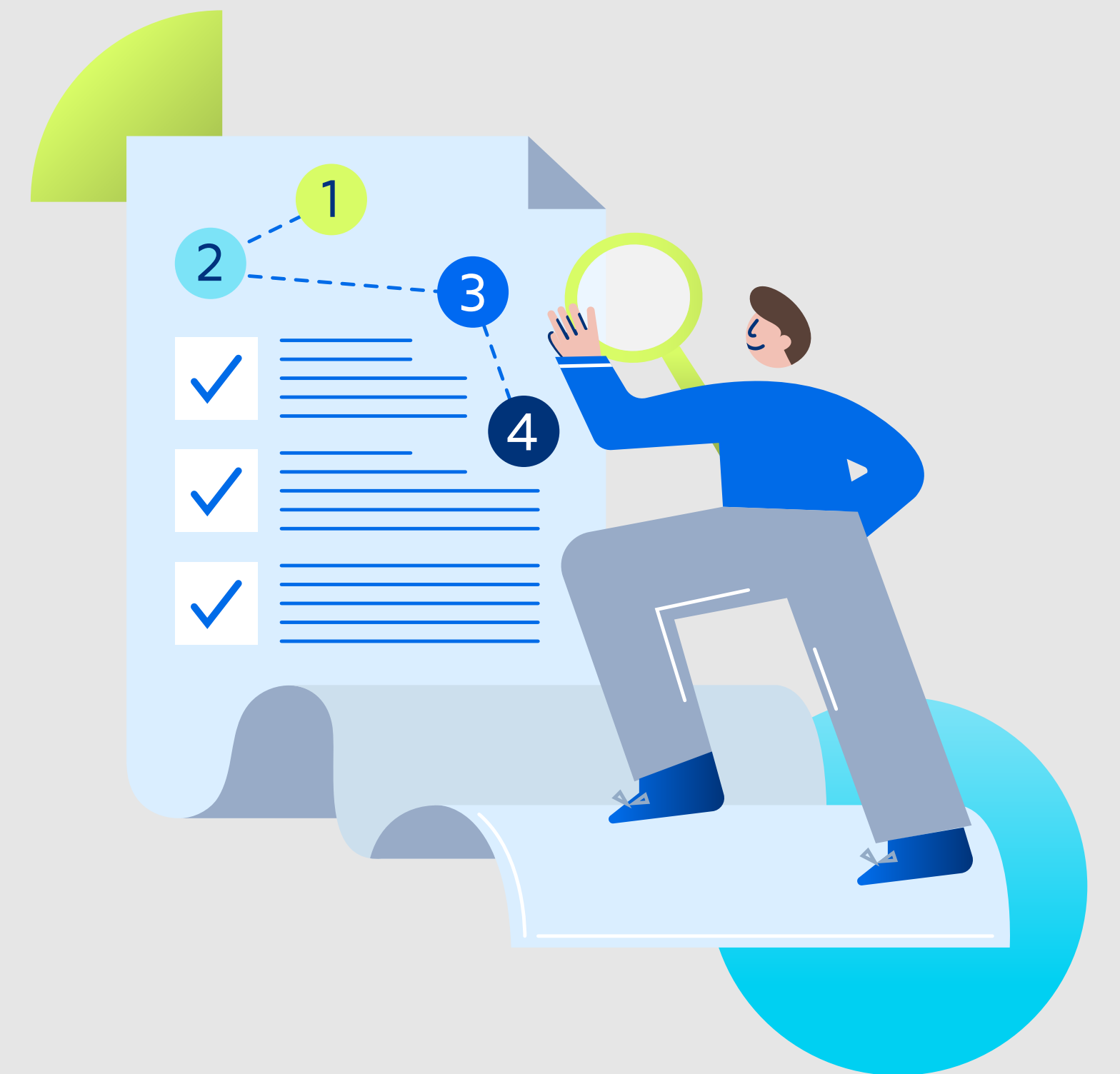
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➤ The Entire Playbook
At A Glance



This playbook is based on multi-country research by the Tech for Good Institute into government-platform partnerships in Southeast Asia in 2025: (specifically commercial digital platforms)



More than 40 senior representatives participated across all three roundtables, including officials from central banks, digital economy ministries, statistics agencies, and social protection bodies; representatives from platform companies and industry associations; civil society advocates; and academic researchers specialising in platform governance and digital policy.

Primary Research Source

Tech for Good Institute (2026). Digital Platforms for Public Benefit: From Digitalisation to Platform-Enabled Governance. Digital Platforms for Public Benefit: From Digitalisation to Platform-Enabled Governance Report. Singapore: Tech for Good Institute.

The collaboration pathway, phased implementation model, and all canvases in this playbook are derived directly from Chapter 4.4 of this report.

The playbook aims to support a shift in how governments approach digital platforms¹:

From	To
Platform partnerships as procurement exercises	➤ Platform partnerships as strategic collaborations
Transactional, vendor-managed relationships	➤ Co-designed, mutually accountable relationships
Technology-driven implementation	➤ Policy-outcome-driven implementation

Who This Playbook is For

This playbook is designed for one primary user: government officials who are responsible for initiating, managing, or overseeing partnerships with commercial digital platforms. Digital platform representatives and researchers may find the contents useful as reference, but the structure, language, and sequencing are designed for the primary user.







¹ This playbook does not constitute legal, financial, or procurement advice. Contexts evolve, and readers are encouraged to verify current conditions and seek appropriate expert advice before initiating formal partnership engagement.

This playbook uses four types of structured tools. Each serves a different purpose and produces a different kind of output. They are designed as facilitated workshops, not desk exercises.

When done right, partnerships with digital platforms do not just reduce government costs.

They expand what is possible, benefitting citizens.

Types of Activities Tools In This Playbook

	Canvas	Assessment	Mapping	Checklist
Activity Type				
Purpose	Design something new together. Align the parties' perspectives through guided prompts.	Score your current state. Identify strengths and gaps that need to be addressed.	Visualise relationships, stakeholders, or flows. Plot elements spatially to reveal patterns.	Verify conditions before moving to the next phase. A go/no-go gate.
Output	A completed one-page document that captures agreed decisions.	A scored diagnostic with specific gaps identified per dimension.	A visual map showing who is involved and how they relate to each other.	A signed-off list confirming readiness to proceed.
Examples	<ul style="list-style-type: none"> - Purpose Alignment - Pilot Design - Data Governance - Exit & Transition Planning - Readiness Improvement - Relationship Health Scorecard 	<ul style="list-style-type: none"> - Government Readiness Assessment - Platform Value Assessment 	<ul style="list-style-type: none"> - Stakeholder Landscape - Platform Capability Mapping - Collaboration Value Creation Map 	<ul style="list-style-type: none"> - Phase Transition Checklists - Decision Gates - Diagnostic Questions

Note

*All canvases are time-boxed to 30–60 minutes per session. Each canvas includes numbered prompts, guiding hints, and a recommended facilitation method.

The Government-Platform Collaboration Pathway at a Glance

The pathway comprises four sequential phases as detailed in Chapter 4, Section 4.4 of our main report. Each builds on its predecessor, though not all partnerships will complete all four. The level of depth applied should match the partnership's scope, complexity, and strategic intent.



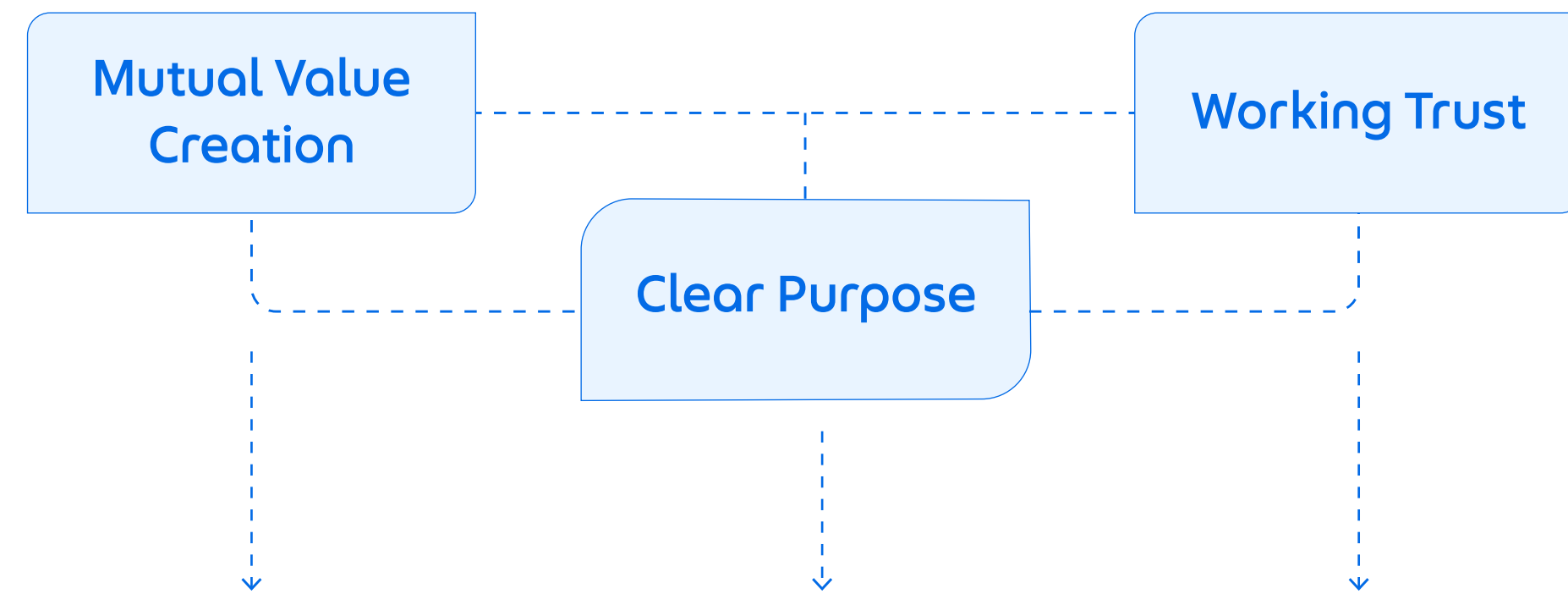
Principles & Pillars Relationship

Before proceeding through the pathway, both parties should internalise **three foundational principles (the 'what')** and **three operational pillars (the 'how to sustain')**. These are not sequential steps but ongoing conditions that underpin every phase.

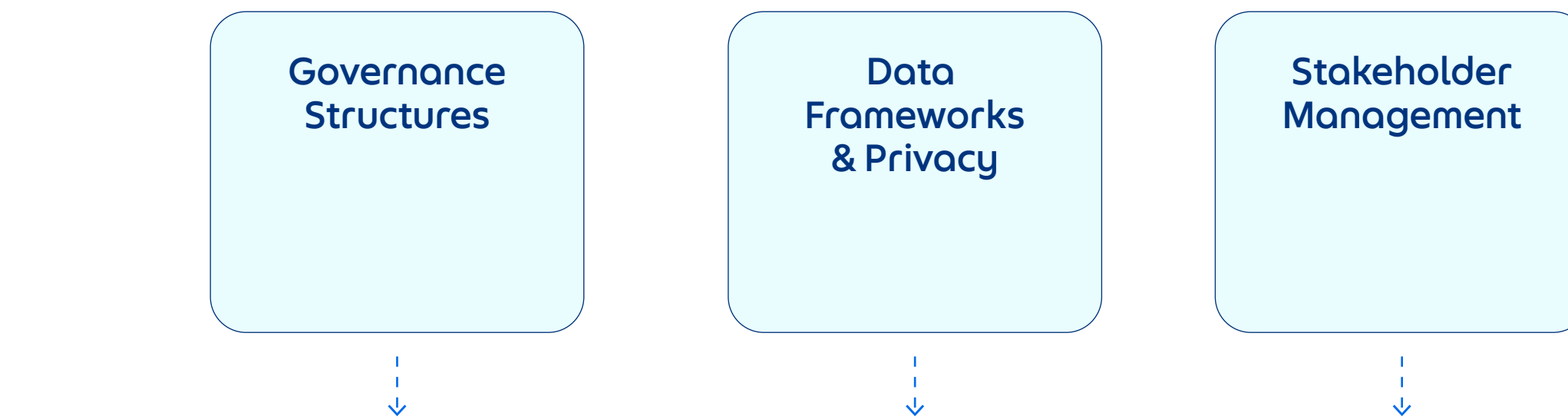
Principles inform
pillars and phases

Pillars sustain
the pathway

Principles (the 'What')



Pillars (the 'How to sustain')



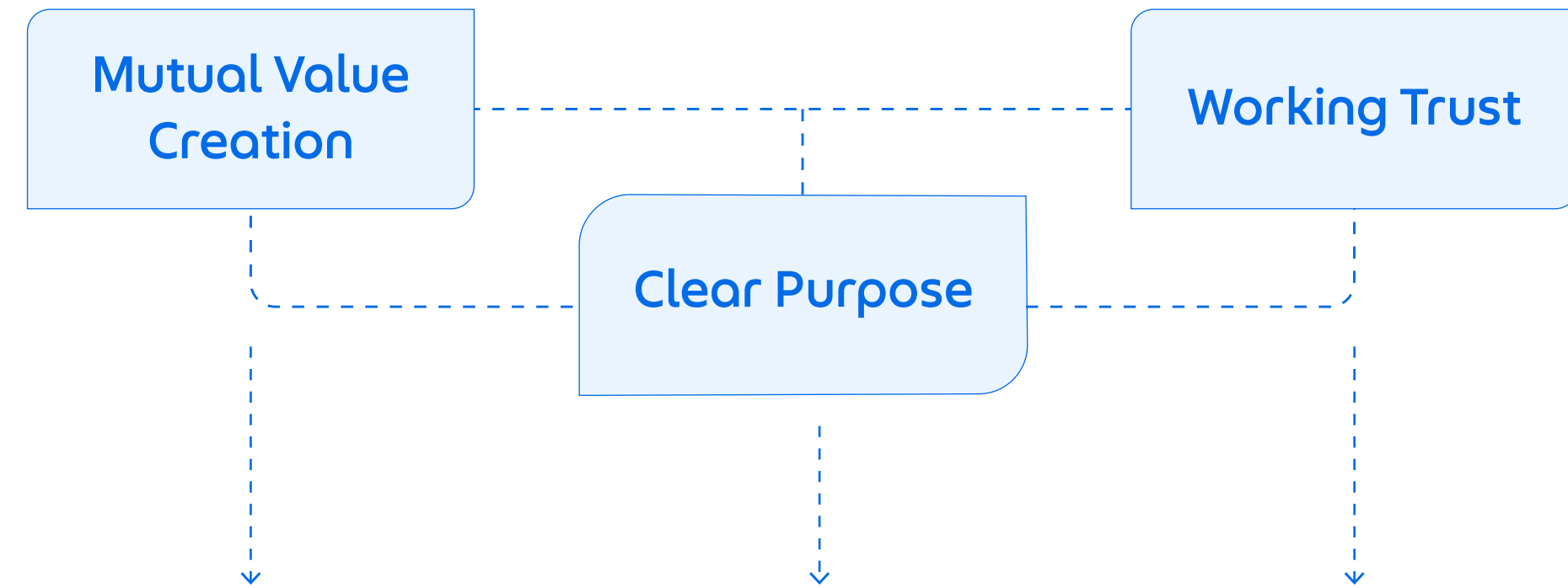
Pathways



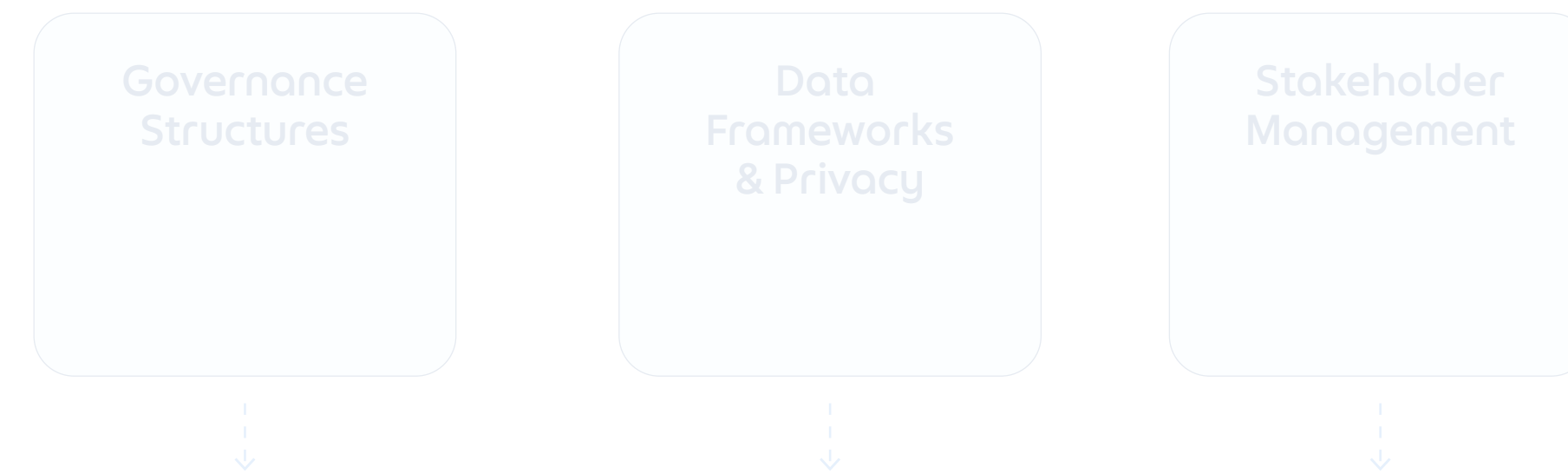
Key Insight

These principles and pillars cannot fully eliminate structural constraints. They create the conditions for partnerships to function effectively despite them. The following pathway translates these principles into a phased action plan. Principles without a pathway remain aspirational; a pathway without principles lacks resilience.

Principles
(the 'What')



Pillars
(the 'How to sustain')



Three Principles – The Foundation

P1 Clear Purpose

Policy clarity provides platforms with strategic direction. Connecting to existing national policy frameworks anchors the initiative in government priorities and ensures continuity across political transitions.

P2 Mutual Value Creation

Both parties clarify the value they bring to the partnership, establishing supportive relationships that ultimately benefit the public.

Eg: Governments achieve policy goals through platform expertise; platforms gain a supportive policy environment and operational legitimacy.

P3 Working Trust

Built through consistent engagement over time, focusing on collaborative co-creation, with platforms engaged as thought-partners from the earliest stages.

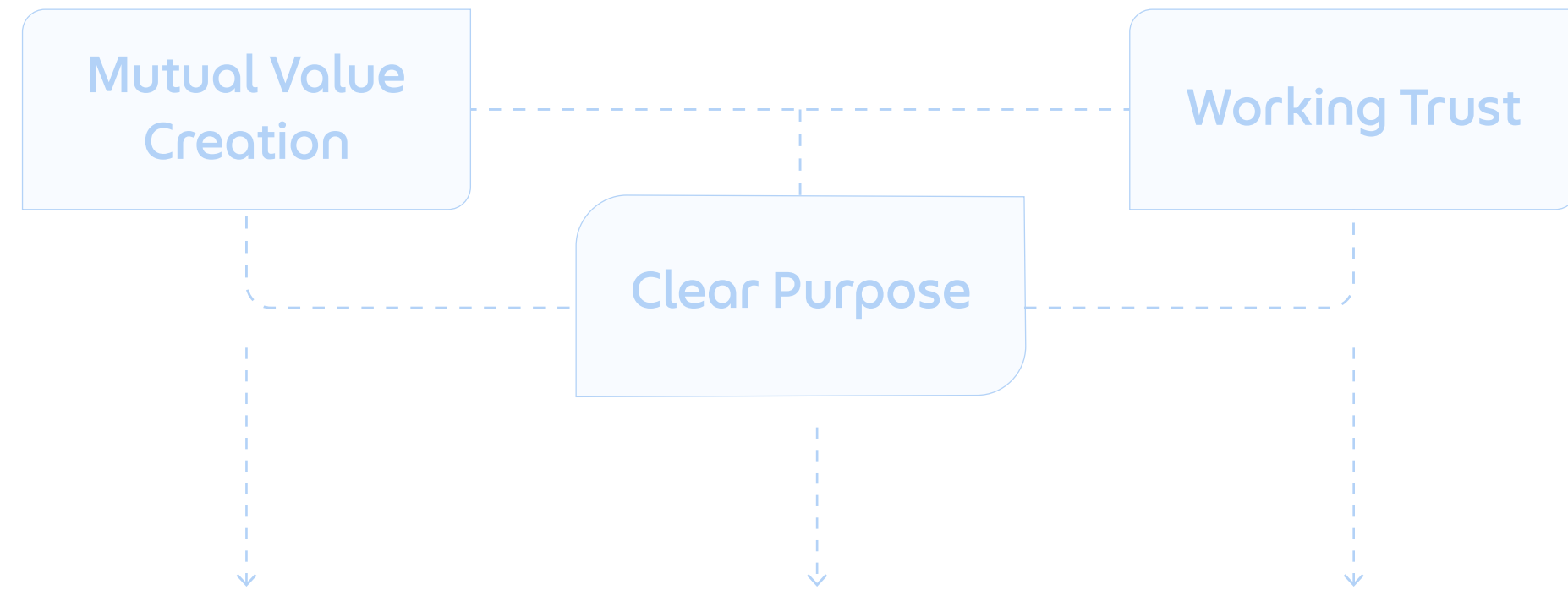
Sustainable solutions emerge from a shared understanding of challenges.

Key Insight

These principles and pillars cannot fully eliminate structural constraints. They create the conditions for partnerships to function effectively despite them. The following pathway translates these principles into a phased action plan. Principles without a pathway remain aspirational; a pathway without principles lacks resilience.

Principles

(the 'What')



Pillars

(the 'How to sustain')



Three Operational Pillars – Sustained Throughout the Partnership Lifecycle

Governance Structures

Joint steering committees with clear roles and decision-making authority. Scale the governance structure up or down based on the partnership’s complexity or needs.

Data Sharing & Privacy

Privacy-by-design from day one. Clear agreements on what data is shared, for what purpose, and how it is protected.

Stakeholder Engagement

Platforms engaged as thought-partners in policy design. Industry associations as ecosystem orchestrators.

Proactive communication sustains public trust.



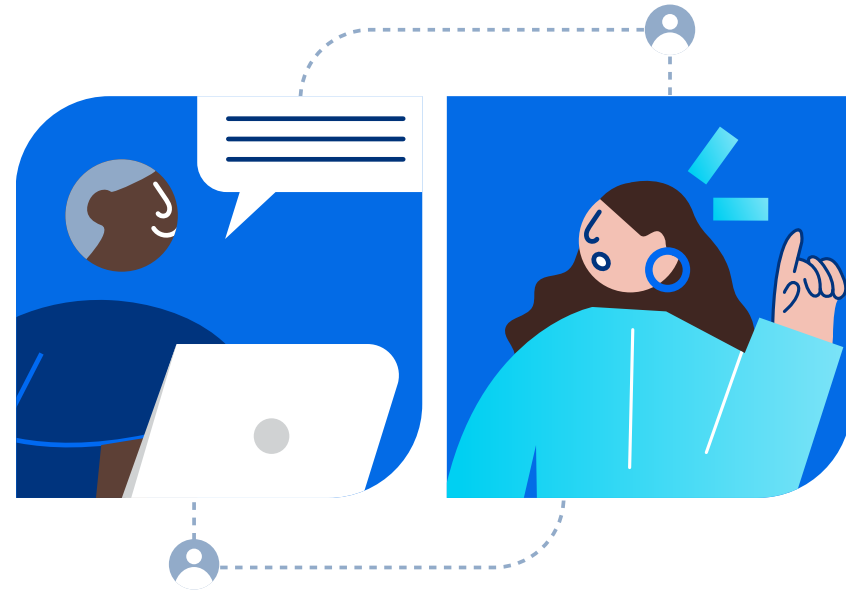
Phase 01

Foundation & Assessment



Foundation & Assessment

Are we ready and aligned?



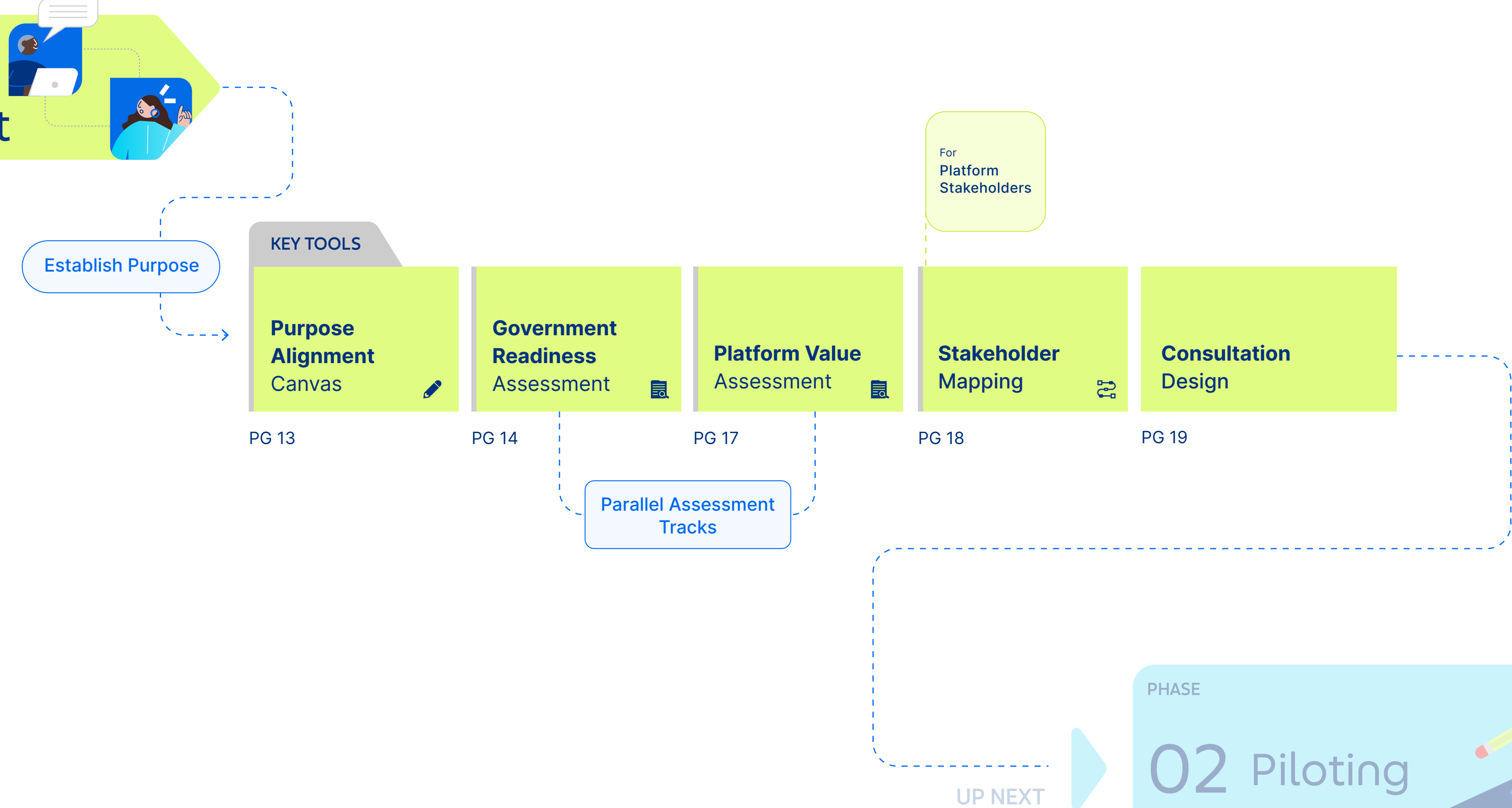
Before engagement, both government and platforms must undertake thorough internal preparation. This phase establishes aligned expectations and confirms that both parties are prepared to collaborate effectively. It cannot be compressed; inadequate preparation at this stage compounds into larger problems in every subsequent phase.



Activity Flow

YOU'RE HERE!

PHASE 01 Foundation & Assessment



Step 1 of 3

Establish Clear Purpose

Clear purpose anchors sustained partnerships by providing platforms with clarity on strategic policy objectives. Partnerships that explicitly connect to defined national development objectives, such as financial inclusion or economic data collection, gain strategic coherence. Connecting partnerships to strong national development frameworks increases the chances of continuity across political transitions and provides platforms with the certainty needed for effective resource allocation.

Purpose Alignment Canvas

 60 mins

Align government and platform stakeholders on the core purpose.


Participants use silent brainstorming to write answers individually **(5 min)**, then share them with the group to test whether all parties agree on the fundamental objectives **(40 min)**.

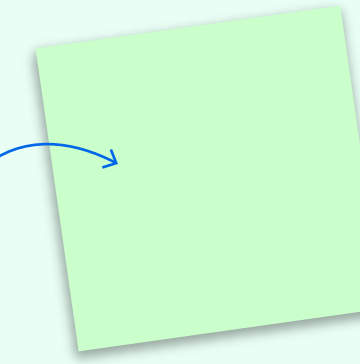
Finally, draw visual connections between the mapped quadrants to demonstrate the strategy's cohesion **(15 min)**. This exercise minimises groupthink and helps draw links between national policy objectives and the partnership.

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

What national development objective does this partnership advance?

 Sample of a sticky note



Name the specific goal: e.g. financial inclusion target, digital skills goal, economic data collection, social protection reach.

1

Which existing national policy framework anchors this partnership?



Link to a published national development strategy, digital economy blueprint, or sector-specific policy document.

2

Why is a platform partnership the right approach for this objective?



What specific infrastructure, reach, or expertise does the platform bring that the government cannot build independently in the required timeframe?

3

What does success look like in 12 months? In 3 years?



Define outcomes in policy terms (e.g., the number of citizens reached, the percentage improvement in access)

4

Step 2A of 3

 **Government Readiness Assessment** 30 mins

Assess your government's readiness to enter and sustain a platform partnership. Candid self-assessment is essential; overestimating readiness is the most common cause of partnership failure at this stage. Rate each dimension on a scale of 1 to 5, where 1 means least ready and 5 means fully ready. Note specific gaps to address before proceeding.

Dimension	Key Question	Score	1 = Least ready 5 = Fully Ready				
Policy Mandate Clarity	<i>Are there clear political commitments and approved policy frameworks that explicitly support this type of partnership?</i>		1	2	3	4	5
Institutional Capacity	<i>Has a lead agency been identified which has the technical expertise, legal authority, and a dedicated team to manage this partnership?</i>		1	2	3	4	5
Legal Framework	<i>Do existing laws permit this partnership model? Are data protection regulations clear enough to proceed?</i>		1	2	3	4	5
Procurement*	<i>Do procurement rules and regulatory requirements accommodate this type of collaboration?</i>		1	2	3	4	5
Resource Commitment	<i>Can the government commit sufficient budget, personnel, and technical resources for at least two to three years?</i>		1	2	3	4	5
Political Sustainability	<i>Is the partnership embedded in institutional frameworks (not dependent on individual champions) with enough cross-party support to survive electoral transitions?</i>		1	2	3	4	5

----->

**PROCEED TO READINESS
SCORE VISUAL GAUGE**

Step 2A of 3

Readiness Score Visual Gauge

Sum your scores across all six dimensions for a total readiness score out of 30.

Score Bands

24 - 30 Strong readiness, proceed to pilot design.

17 - 23 Targeted gaps, address weaker dimensions before piloting.

Below 17 Foundational work needed before the partnership progresses.

Note

* A low score on Procurement should be treated as a blocker regardless of total.

→
PROCEED TO READINESS IMPROVEMENT CANVAS

Policy Mandate Clarity	4
Institutional Capacity	2
Legal Framework	4
Procurement*	1
Resource Commitment	2
Political Sustainability	4

Address gap first.

Total Score | **17**

Readiness Score Gauge








Step 2A of 3

Readiness Improvement Canvas

 45 mins

For any dimension where you scored 3 or below, use this canvas to develop a concrete action plan. Use colour-coded sticky notes on a shared board (physical or digital). Each step builds on the previous one.

Score	Improvement Plan	Readiness Improvement Canvas
1	<p>Identify hurdles and bottlenecks</p> <p>What is preventing this dimension from scoring higher?</p> <p> Use red sticky notes.</p>	<div style="border: 1px dashed gray; padding: 10px;"> <p style="text-align: right; margin-bottom: 0;">Action Plan</p> <p>Procurement</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <div style="width: 30px; height: 30px; background-color: #f8d7da;"></div> <div style="width: 30px; height: 30px; background-color: #f8d7da;"></div> <div style="width: 30px; height: 30px; background-color: #f8d7da;"></div> </div> <p>Institutional Capacity</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <div style="width: 30px; height: 30px; background-color: #fff3cd;"></div> <div style="width: 30px; height: 30px; background-color: #fff3cd;"></div> </div> <p>Policy Mandate Clarity</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> </div> <p>Legal Framework</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> </div> <p>Political Sustainability</p> <div style="display: flex; justify-content: space-around;"> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> <div style="width: 30px; height: 30px; background-color: #d1ecf1;"></div> </div> </div>
2	<p>Identify how to overcome or mitigate</p> <p>For each hurdle, what solutions or workarounds exist?</p> <p> Use yellow sticky notes.</p>	
3	<p>Identify supporting agencies</p> <p>Which agencies or individuals need to be involved to support this mitigation?</p> <p> Use green sticky notes.</p>	
4	<p>Select the top 3 actions</p> <p>What are the top 3 actions you can take or engage with stakeholders to mitigate these hurdles?</p> <p> Use purple sticky notes.</p>	
5	<p>Prioritise for the next 12 months</p> <p>Which actions can be completed within 12 months with these stakeholders?</p> <p> Use blue sticky notes.</p>	

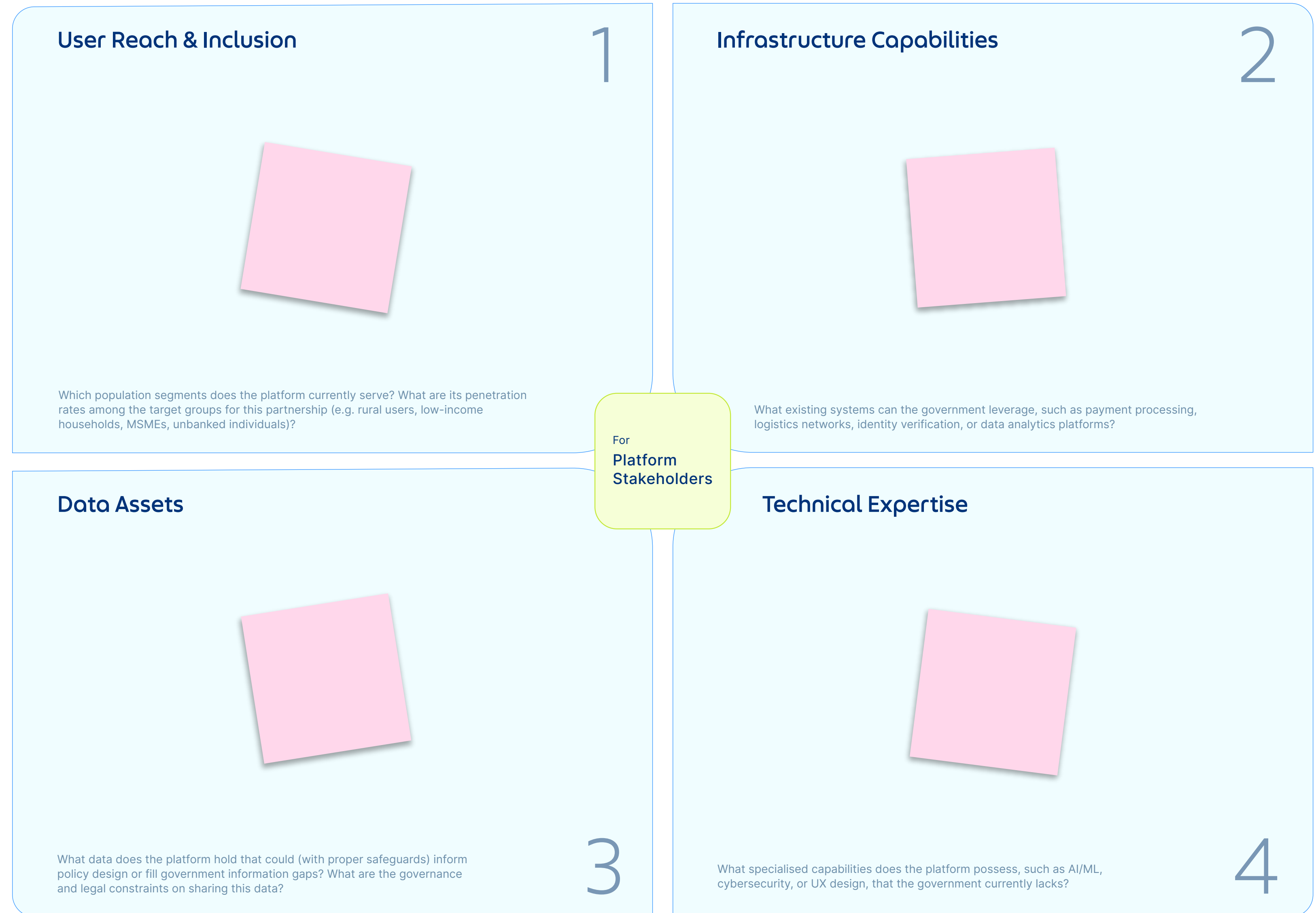
Step 2B of 3

Platform Value Assessment

 45 mins

Document what the platform brings to this partnership. Platform stakeholders complete each quadrant individually **(20 min)** and present to the government counterpart for joint review and discussion **(25 min)**.

Format inspired by the Strategic Partnerships framework: each quadrant maps a platform value dimension against a specific public policy need.



Step 3 of 3

Stakeholder Mapping

60 mins

Map out key cross-functional stakeholders and their level of project responsibility. Identify stakeholders, teams and the nature of involvement. Place them on the map according to their involvement, and use markers to highlight key aspects (45 min). Then share with the wider teams to ensure alignment (15 min).

Format inspired by the RACI matrix: the visual map guarantees strong cross-functional representation and helps prevent critical knowledge gaps.

Responsible

Doing the work - The core team, generally

Accountable

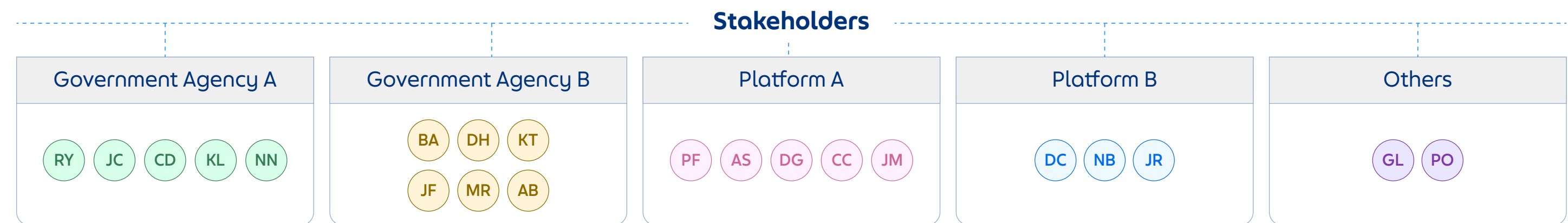
Answers for the work - often leadership

Consulted

Experts/MSMEs to learn from

Informed

Kept in the loop



RACI Framework

STEP 1

List your stakeholders in the legend above and assign each a colour group.

STEP 2

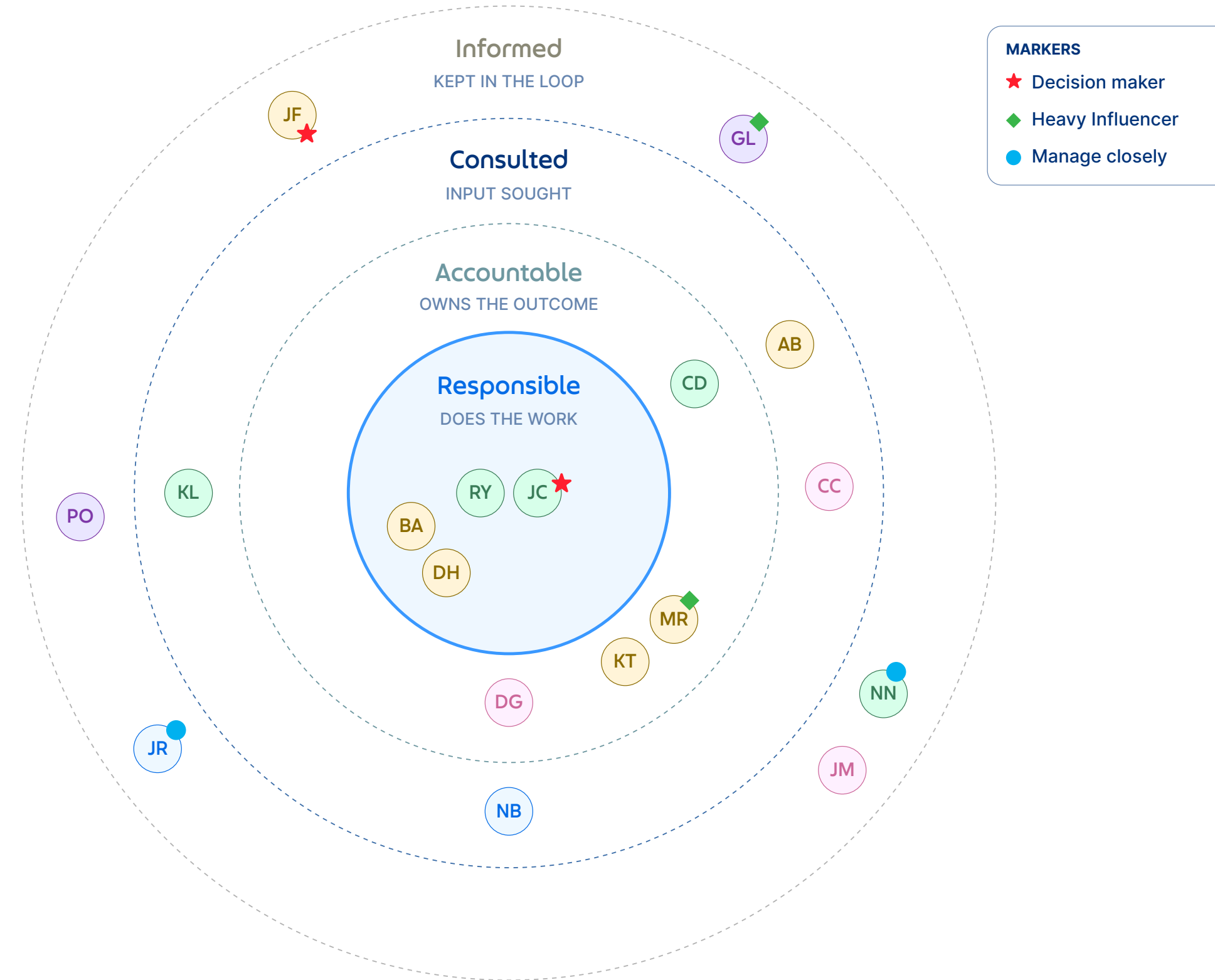
Write each person's initials in a circle and place them in the correct RACI column.

E.g. Rebecca Ynez's initials would be (RY).

STEP 3

Add markers where applicable.

- ★ Decision maker
- ◆ Heavy Influencer
- Manage closely



Consultation Design

Following stakeholder mapping, partnerships must establish structured engagement mechanisms throughout the collaboration lifecycle. Effective and extensive consultation requires:

- Identifying appropriate engagement formats for different stakeholder groups
- Establishing regular consultation touchpoints at key decision stages
- Creating feedback mechanisms to incorporate stakeholder input into partnership design
- Ensuring consultation outcomes inform subsequent phases of the collaboration pathway

This approach operationalises the principle of extensive stakeholder consultations, ensuring stakeholders are not merely mapped but actively engaged as the partnership evolves.

Collaborative Workshops

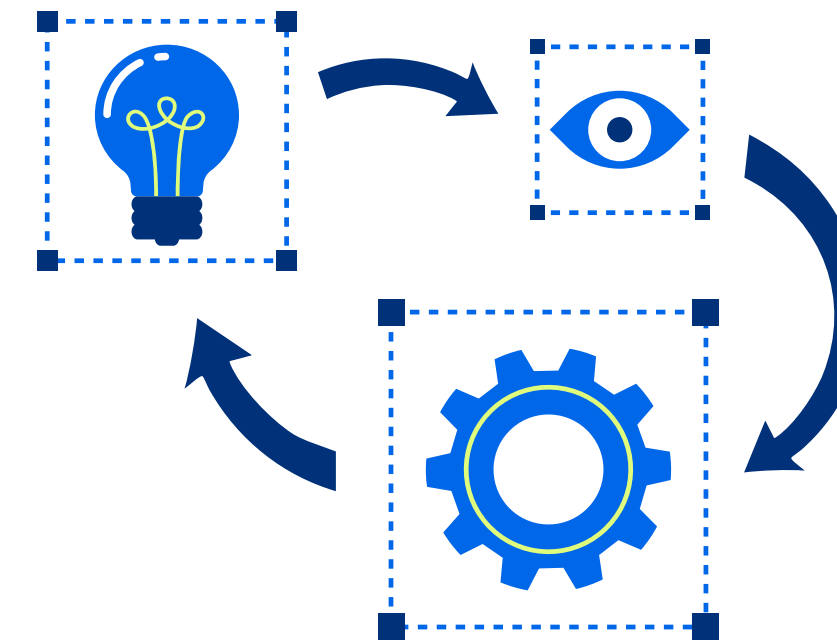
Structured joint analysis sessions



Structured sessions bringing together government officials, platform technical teams, and relevant experts to analyse challenges thoroughly. Platforms contribute as thought-partners in solutioning, not as vendors responding to specifications.

Iterative Concept Design

Multiple refinement rounds



Multiple rounds of refinement as concepts are tested against operational realities, user needs, and technical constraints. This builds 'demonstrated capabilities' as both parties offer their respective strengths through the design process.

User-Centred Approaches

Direct beneficiary engagement



Direct engagement with intended beneficiaries to understand their needs and preferences. This ensures that solutions are grounded in the platform's deep understanding of stakeholder needs, a key reason for early engagement with the platform.

Phase 01

Phase 02

- Both parties can independently describe the partnership's purpose and what each side brings
- Descriptions align without significant divergence
- Policy objective, governance lead, and legal framework are all confirmed
- Government Readiness Assessment completed with all six dimensions scored
- Lead agency identified and personnel formally assigned
- Platform Capability Mapping completed and shared with the government counterpart
- Platform leadership committed to engagement for at least two to three years
- All relevant stakeholders mapped and at least one round of consultation completed
- Engagement plan agreed with named contacts and scheduled touchpoints

Transition Readiness

Proceed ▶▶▶

When both parties can independently describe the partnership's purpose and what each side brings, and their descriptions align.

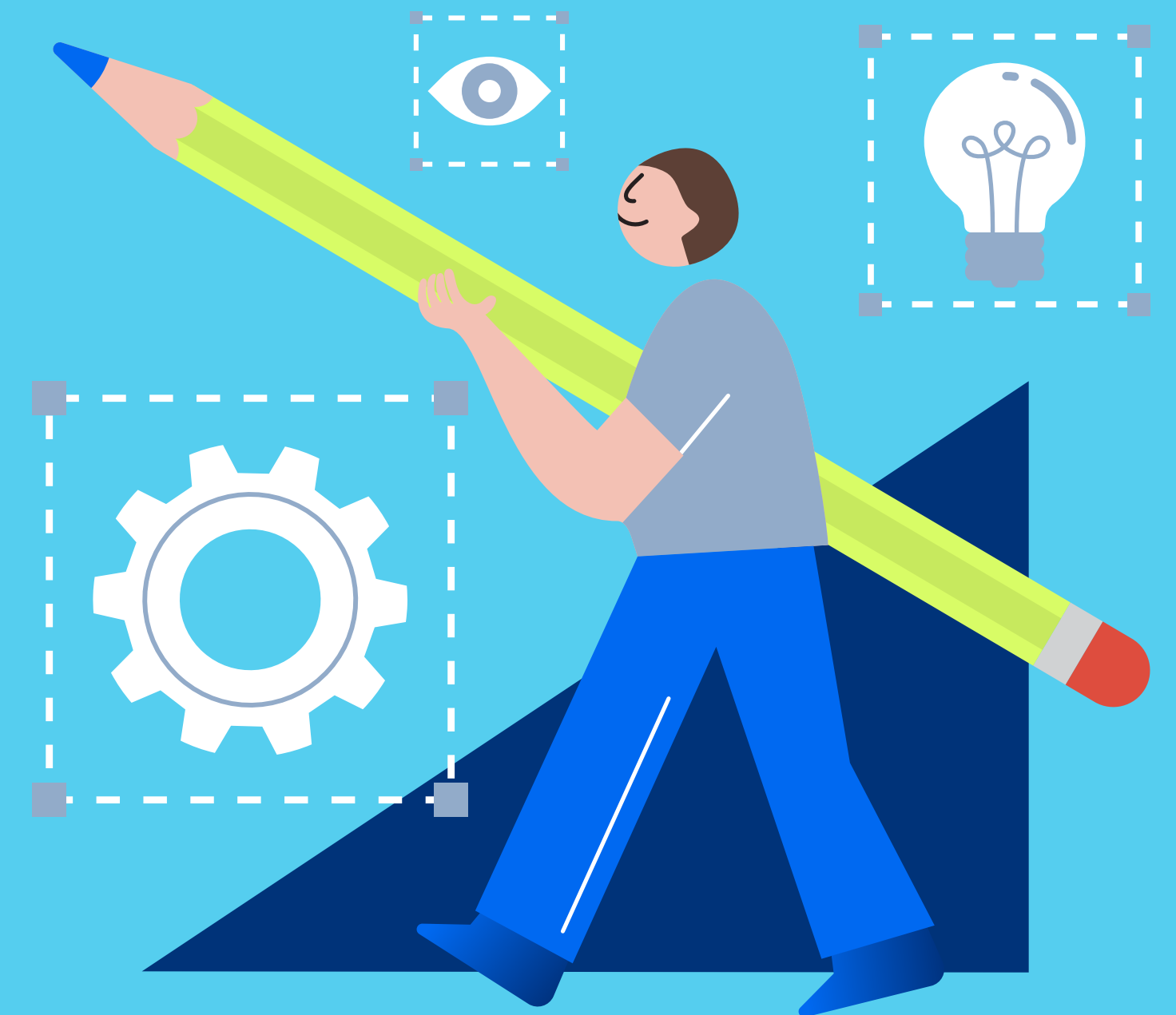
Pause ⏸

When either party is unclear about the policy objective, the governance lead, or whether the legal framework supports the proposed model.



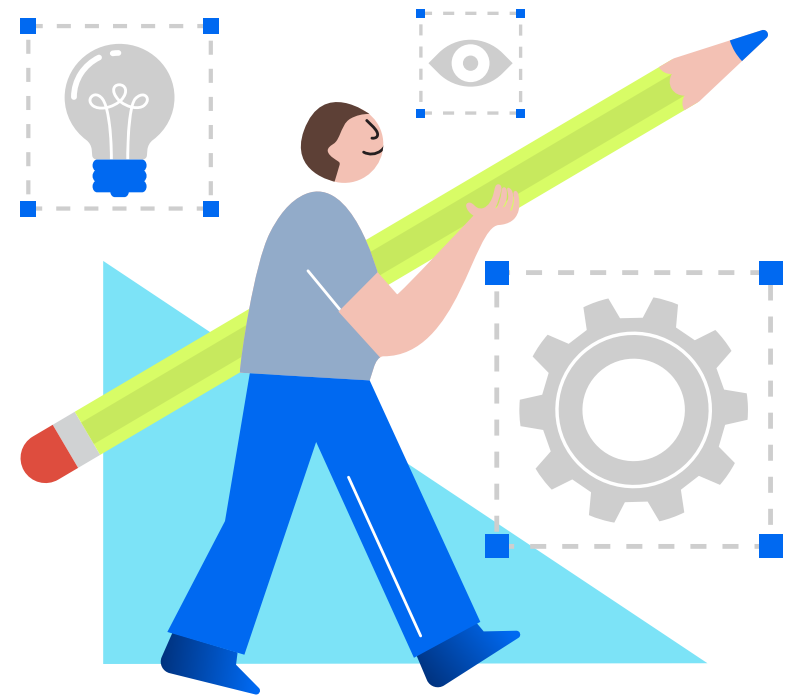
Phase 02

Piloting



Piloting

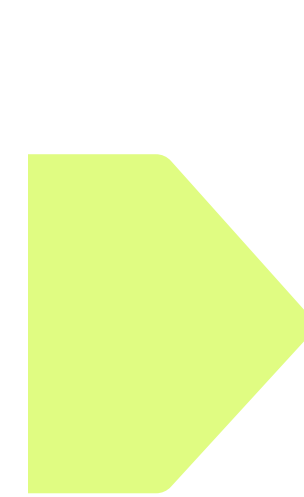
Does this work in practice?



Phase 2 translates the foundation into concrete pilots tested in controlled environments. Piloting enables structured learning, iteration, and evidence gathering while reducing risk for all stakeholders. Not all pilots will advance to formalisation; this is an expected and acceptable outcome. The purpose of piloting is to generate an evidence base, not to confirm a predetermined conclusion. Data governance, including proprietary data protection, is maintained throughout the pilot phase.



Activity Flow



YOU'RE HERE!

PHASE

02 Piloting



KEY TOOLS

Pilot Program Design Canvas

PG 25

Data Sharing & Data Privacy Canvas

PG 27

UP NEXT



PHASE

03 Formalisation & Scaling



Step 1 of 3

Regulatory Sandbox Design

Workshop participants across all three countries consistently advocated replacing blanket rules with proportionate, context-specific requirements. Regulatory sandbox mechanisms allow innovations to be tested under relaxed regulatory requirements with supervisory oversight, generating real-world data before permanent regulations are established.

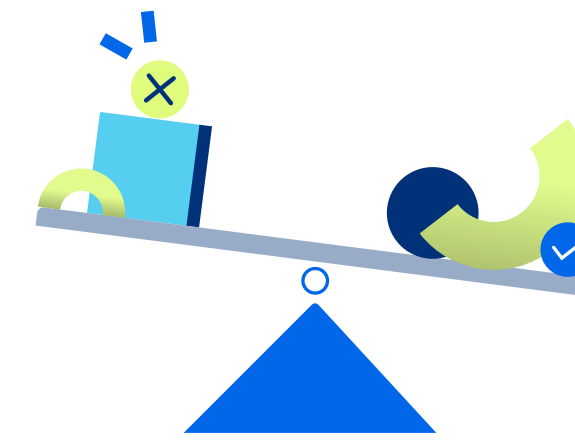
Non-Negotiable Even In Pilots

- ⚠ Privacy impact assessments must be conducted, even for limited pilots.
- ⚠ Data minimisation principles apply from day one. 'No, we'll deal with governance later.'
- ⚠ Security standards appropriate to data sensitivity and the platform's IP rights must be implemented.
- ⚠ User consent and transparency requirements must be met.

Note

These are the floor, not aspirational targets. A pilot that compromises on these is not ready to launch.

What Regulatory Sandboxes Enable



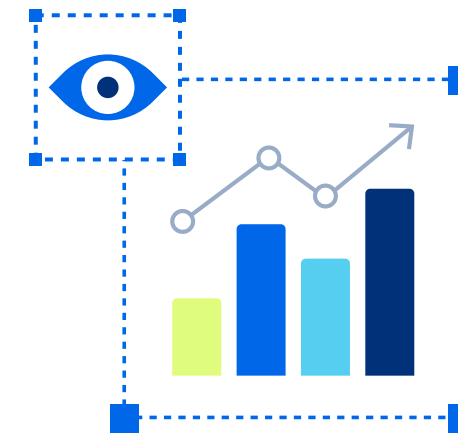
Risk-Based Approaches

Tiered requirements based on actual risk



Controlled Testing

Supervisory oversight before full exposure



Evidence Gathering

Real-world data before permanent rules



Compliance Burden Assessment

Cost vs benefit is explicitly measured

Step 2 of 3

Pilot Program Design Canvas

Effective pilots share four design characteristics, all of which should be defined before launch. Setting metrics retrospectively invites confirmation bias and undermines the pilot's value as a learning exercise.

Defined Scope

1

Set clear boundaries for what the pilot will and will not cover.

Geography _____

User Population _____

Service Offering _____

Duration _____

Success Metrics – Set before launch

2

How will you know if this pilot worked? Define metrics now to avoid confirmation bias later.

Process metrics *E.g. Uptake rate, service availability* _____

Outcome metrics *E.g. Policy objective achieved* _____

Equity metrics *E.g. Reach among underserved groups* _____

Learning Agenda

3

What specific questions does this pilot aim to answer? These are the unknowns you need to resolve before scaling.

Q1 _____

Q2 _____

Q3 _____

Q4 _____

Q5 _____

Iteration Mechanisms

4

How will you adjust the course during the pilot? Define who can make changes and what would trigger a pause.

Review cadence *E.g. Weekly/monthly* _____

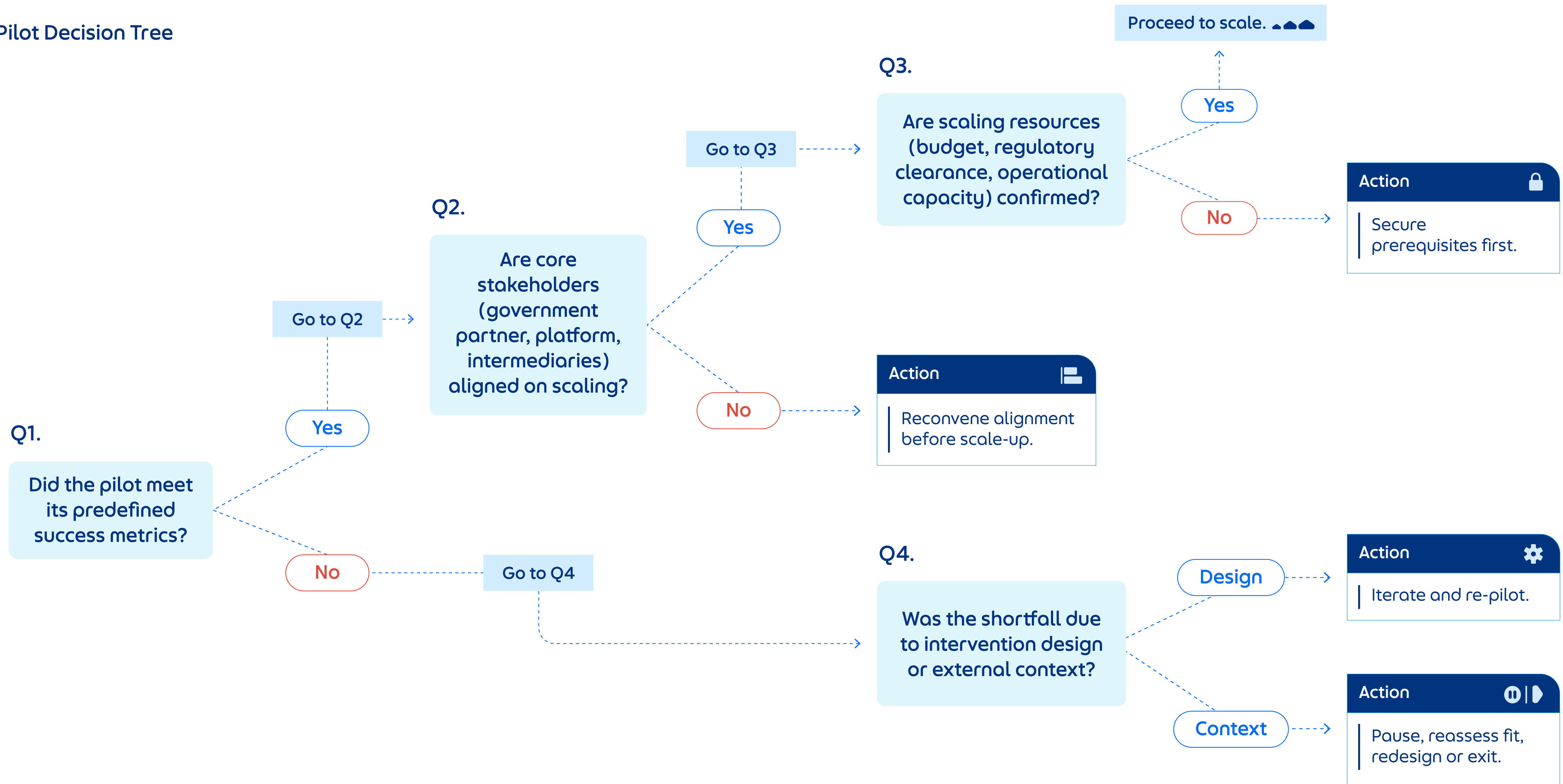
Who has authority to change the pilot _____

Stop/go criteria *What triggers a pause or end?* _____



PROCEED TO PILOT DECISION TREE

Pilot Decision Tree



Step 3 of 3

Data Sharing and Data Privacy Canvas

Data governance underpins credibility in government-platform partnerships. All partnerships must be built on a ‘privacy-by-design’ foundation, with clear agreements specifying what data is shared, for what purpose, and under what protections.

 60 mins

Establish clear protocols and boundaries before deploying the data-sharing framework. A paired team of government and platform representatives works through all six sections together **(45 min)**, and then jointly validates the completed canvas to ensure absolute alignment **(15 min)**. Format inspired by data governance canvases: this collaborative exercise mitigates compliance risks, guarantees mutual understanding of data usage, and ultimately serves as a formal annex to the partnership agreement.

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

Data Minimisation

What specific data fields are strictly necessary for the partnership's objectives? List what will NOT be collected. Define the boundaries of how data may be used (purpose limitation).



1

Purpose & Legal Basis

What will the data be used for, by whom, and for what objectives? This must be specified before or at the time data is collected. **Note***: respect the platform's legal rights to proprietary data and intellectual property.

State precisely!



2

Aggregation & Anonymisation

Which data will be shared only in aggregate (summary) form rather than as individual records? What techniques will be used to anonymise data (e.g. k-anonymity, differential privacy)?



3

Security Standards

Encryption standards, who has access (access controls), audit logging, and intrusion detection systems. Include breach notification timelines (e.g. within 72 hours) and response procedures.

Specify!



4

Oversight Mechanisms

Who will verify compliance: an independent audit team, an external reviewer, or a regulatory body? How often will audits occur? How will findings be reported?



5

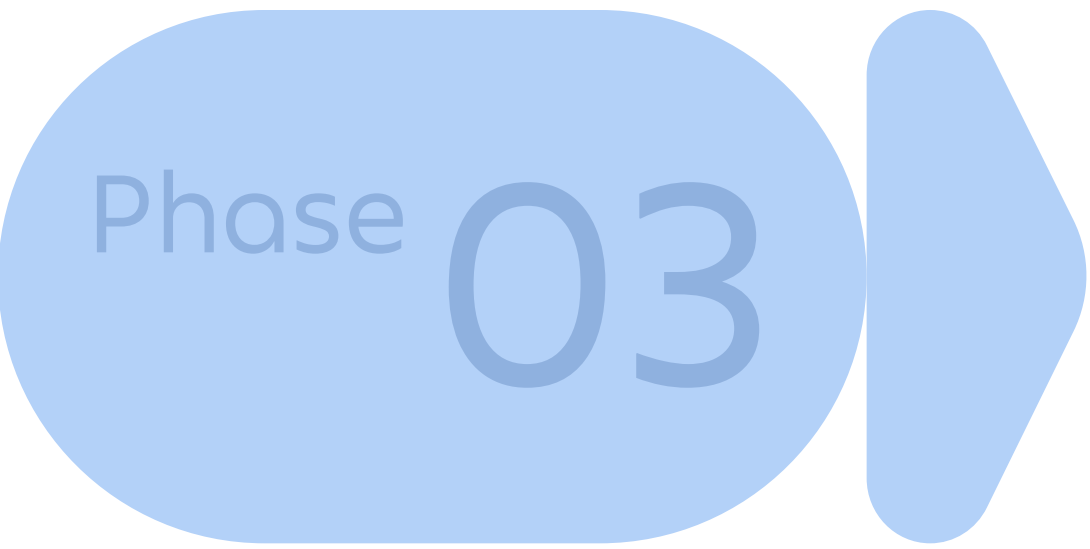
Data Retention & Deletion

How long will data be retained? What is the maximum retention period that allows identification of individuals? Describe the secure deletion procedures when data is no longer needed.



6

Phase 02



- Pilot results meet the success criteria that were set before launch
- Non-negotiable governance essentials (data privacy, security, consent) verified as working in practice
- Learning agenda questions answered with documented evidence and data
- Both parties have formally agreed to proceed to formalisation and scaling

*Note: Sometimes, pilot projects can be the end objective despite success. This depends on agreed-upon objectives from the beginning.

Pilot Decision Framework

Scale

When metrics are met, foundations are strong, and both parties agree to scale. Document learnings.

Iterate

When evidence suggests modifications could improve outcomes significantly.

Conclude

When the policy objective is unachievable at an acceptable cost or risk. Document learnings.



Phase 03

Formalisation & Scaling

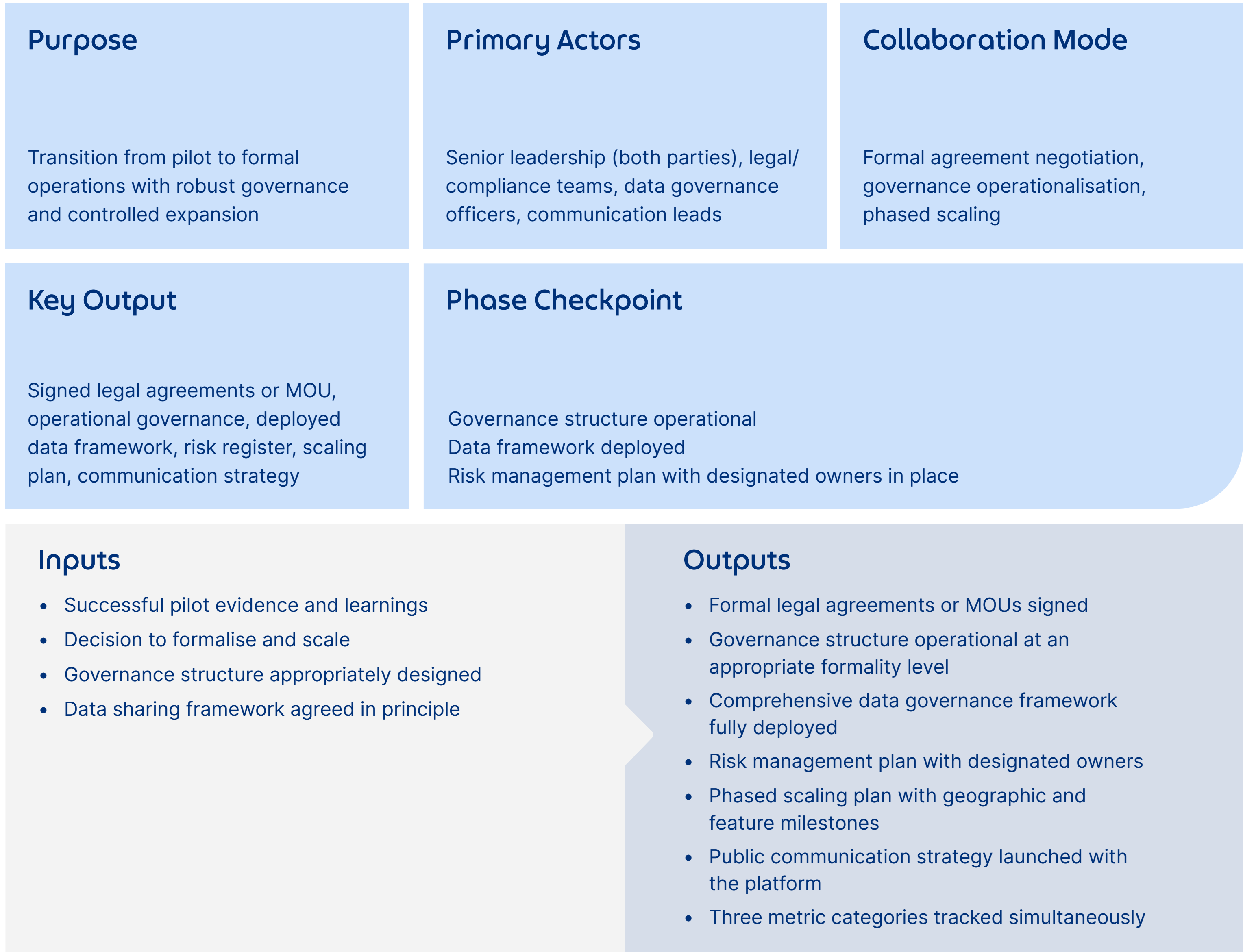


Formalisation & Scaling

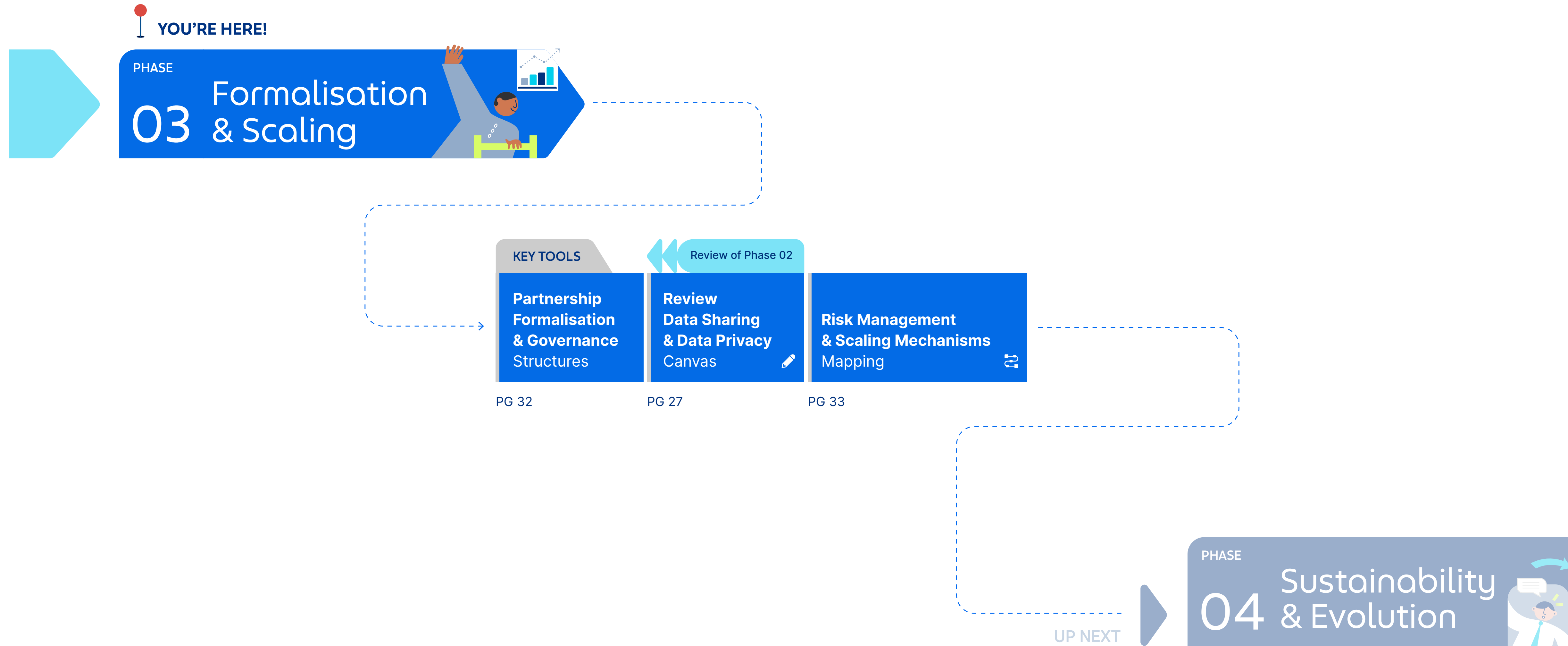
How do we make this official and expand?



Following a successful pilot, the partnership transitions into a formal operational phase focused on controlled expansion and governance. Working trust is now supplemented by formal structures. Documented agreements, rather than relationships alone, protect programmes across leadership transitions.



Activity Flow



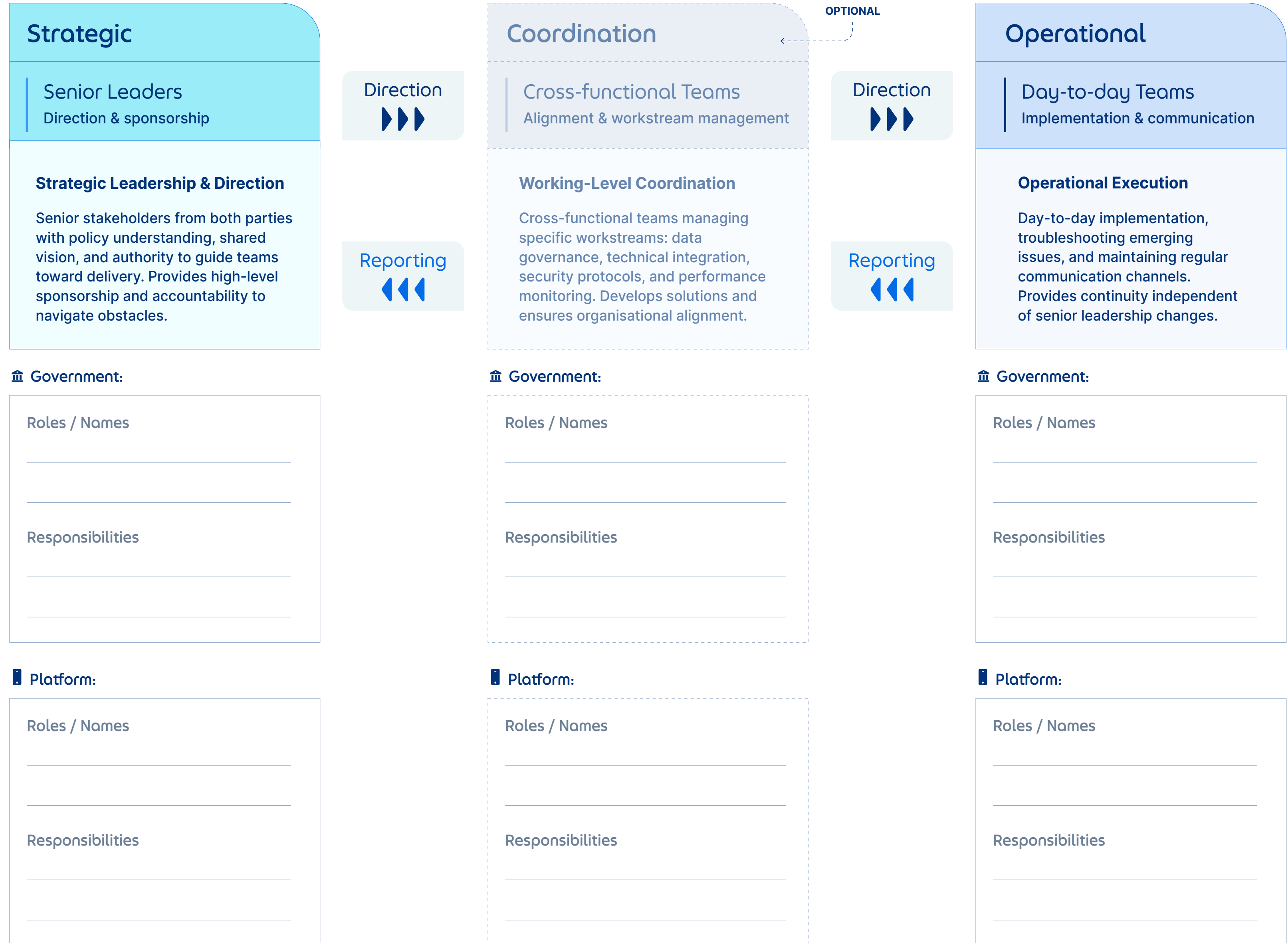
Step 1 of 3

Partnership Formalisation and Governance Structures

Governance structures should prioritise clarity over procedural complexity. Relationships must be formalised through agreements that define roles, responsibilities, data governance provisions, and success metrics. The level of governance formality should be proportionate to the partnership's complexity; straightforward collaborations may require only lightweight coordination mechanisms. Overall, building strong governance structures early provides the opportunity to transition from reactive improvisation to proactive institutionalisation.

Note

Scale formality to the partnership's complexity — not every partnership needs all three tiers. *Tip: Start with Operational + Strategic only. Add coordination tier as complexity grows.



Step 2 of 3

Reviewing Data Sharing and Data Privacy Canvas

Review the 'Data Sharing and Data Privacy Canvas' completed during the **Pilot phase (Phase 2)** and update it to meet the needs of this stage. Ideally, compliance is ensured through audits.

Step 3 of 3

Risk Management and Scaling Mechanisms Mapping

Both parties collaboratively identify potential risks and develop corresponding mitigation strategies before scaling. Pre-emptive risk assessment supports public trust and service continuity. This register provides potential examples that should be populated jointly. Both parties should also add or remove risk descriptions accordingly, based on the nature of the project.

01


Identify risks together.

02

For every risk you find, write down how you'd handle it and who owns the response.

03

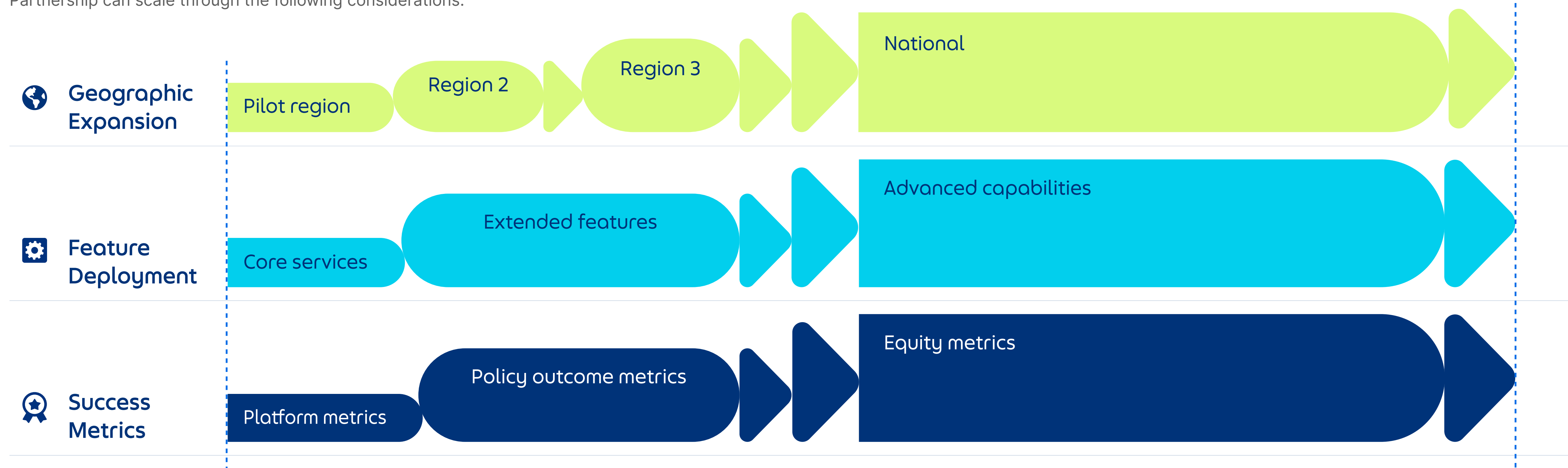
The register below gives you examples to start from. Add, remove, and edit to fit your project.

Risk Category	Description & Indicators	Mitigation Owner	Contingency Plan
Technical Failure	System downtime, data backup failures, or service outages during high-demand periods.	_____	_____
Cybersecurity Threat	Data breach, incident detection gaps, or failure to act on threat intelligence.	_____	_____
Low Adoption	Below-target uptake due to poor UX, lack of awareness, or exclusionary eligibility criteria.	_____	_____
Regulatory Change	New laws or policy changes require agreement renegotiation or increasing compliance costs.	_____	_____
Partnership Dissolution	Key personnel departure, political or leadership change, or commercial decision to exit.	_____	_____
 Add Risks	<i>Add other risks that may be specific to your context.</i>	_____	_____

Note: Scaling Mechanisms

Partnership can scale through the following considerations:

-----> **Scaling: Progressive Expansion**



● Phased Geographic Expansion

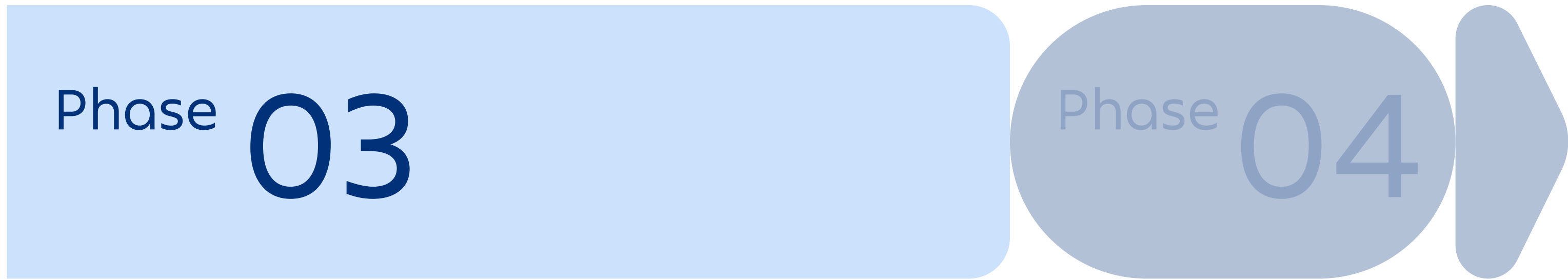
Region-by-region rollout with continued learning and iteration, applying pilot lessons to each new context. Avoid premature national rollout.

● Graduated Feature Deployment

Core services first, then graduated complexity as governance frameworks mature and capacity grows. Each feature addition should be evidence-informed.

● Comprehensive Success Metrics

Track platform metrics (availability, response times, security incidents), policy outcome metrics (financial inclusion rates, MSME revenue growth, digital skills acquisition), and equity metrics (reach across demographics, accessibility for vulnerable populations) simultaneously via real-time dashboards.



- Formal agreement signed and governance structure operational
- Data governance framework updated from pilot phase and verified through audit
- Risk management plan completed for all five categories with designated owners
- Scaling plan progressing against milestones with metrics actively tracked



Phase 04

Sustainability & Evolution



Sustainability & Evolution

How do we keep this effective over time?



Not all partnerships will reach this phase. For those that do, Phase 4 addresses long-term robustness. Technology, citizen needs, and policy landscapes evolve continuously; built-in mechanisms for review and adaptation are therefore essential to sustained relevance.

Purpose

Ensure long-term robustness through active maintenance, adaptation, and responsible transition planning

Primary Actors / Resources

Relationship managers, strategic review committees, detailed documentation of learnings, including successes and failures

Collaboration Mode

Ongoing partnership management with periodic strategic reviews and adaptation cycles

Key Output

Active relationship management, strategic review schedule, adaptation loops, transition plan

Phase Checkpoint

Policy objective achieved;
Platform exit;
Political transition; or Technology shift

Inputs

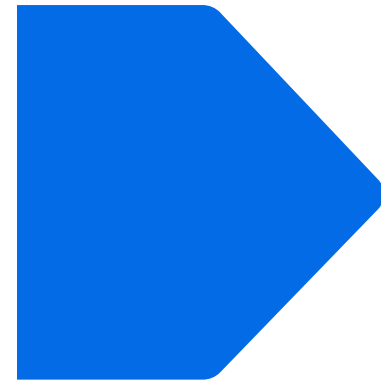
- Operational partnership at scale
- Aligned teams with relationship managers
- Strategic review schedule established
- Detailed documentation of what works, what does not, and learnings

Outputs

- Dedicated relationship managers designated on both sides
- Strategic review schedule established (semi-annual/annual)
- Adaptation feedback loops are active
- Exit/transition plan documented with pathways assessed
- Knowledge base archived for future initiatives

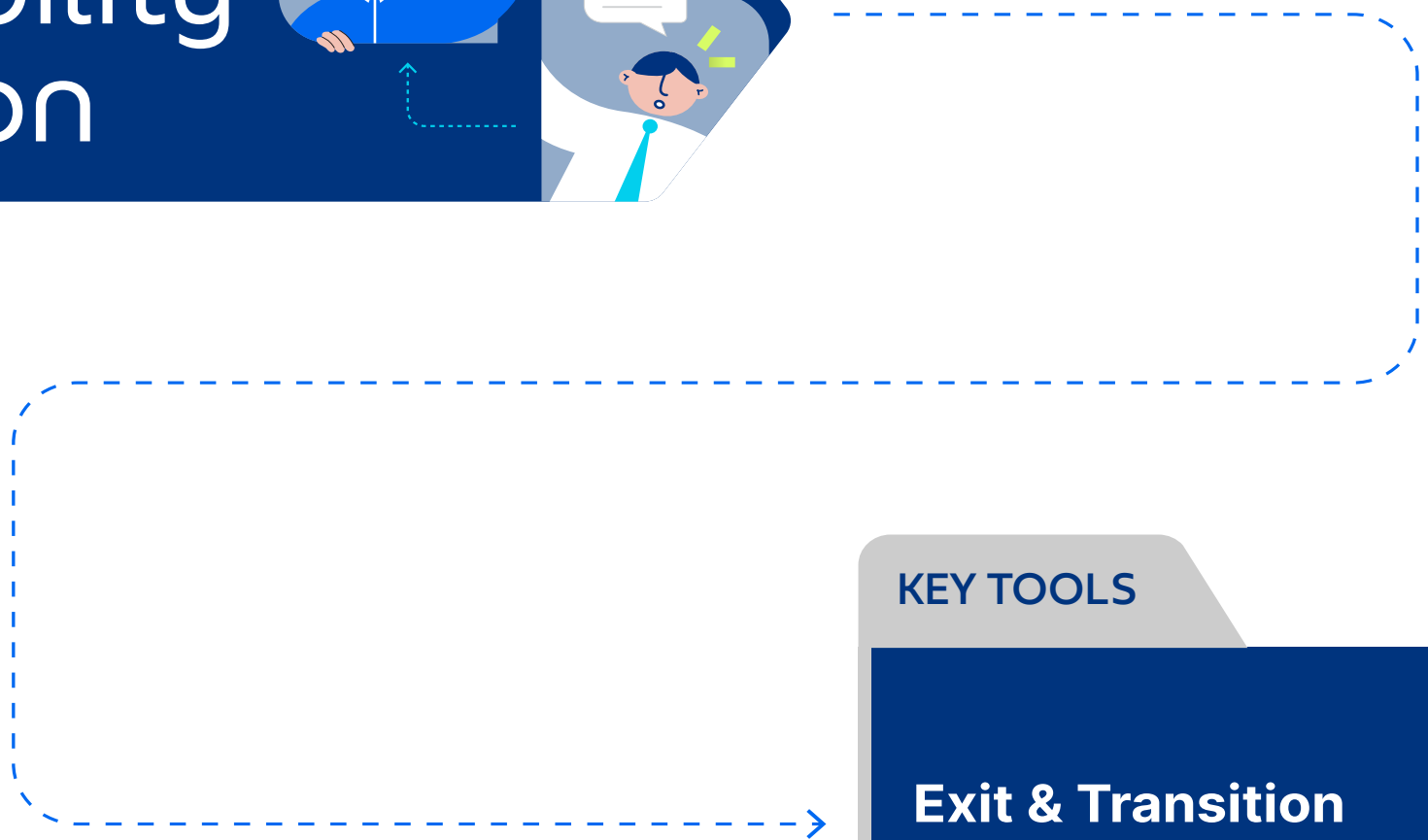
Activity Flow

 **YOU'RE HERE!**



PHASE

04 Sustainability & Evolution



KEY TOOLS

Exit & Transition Planning Canvas



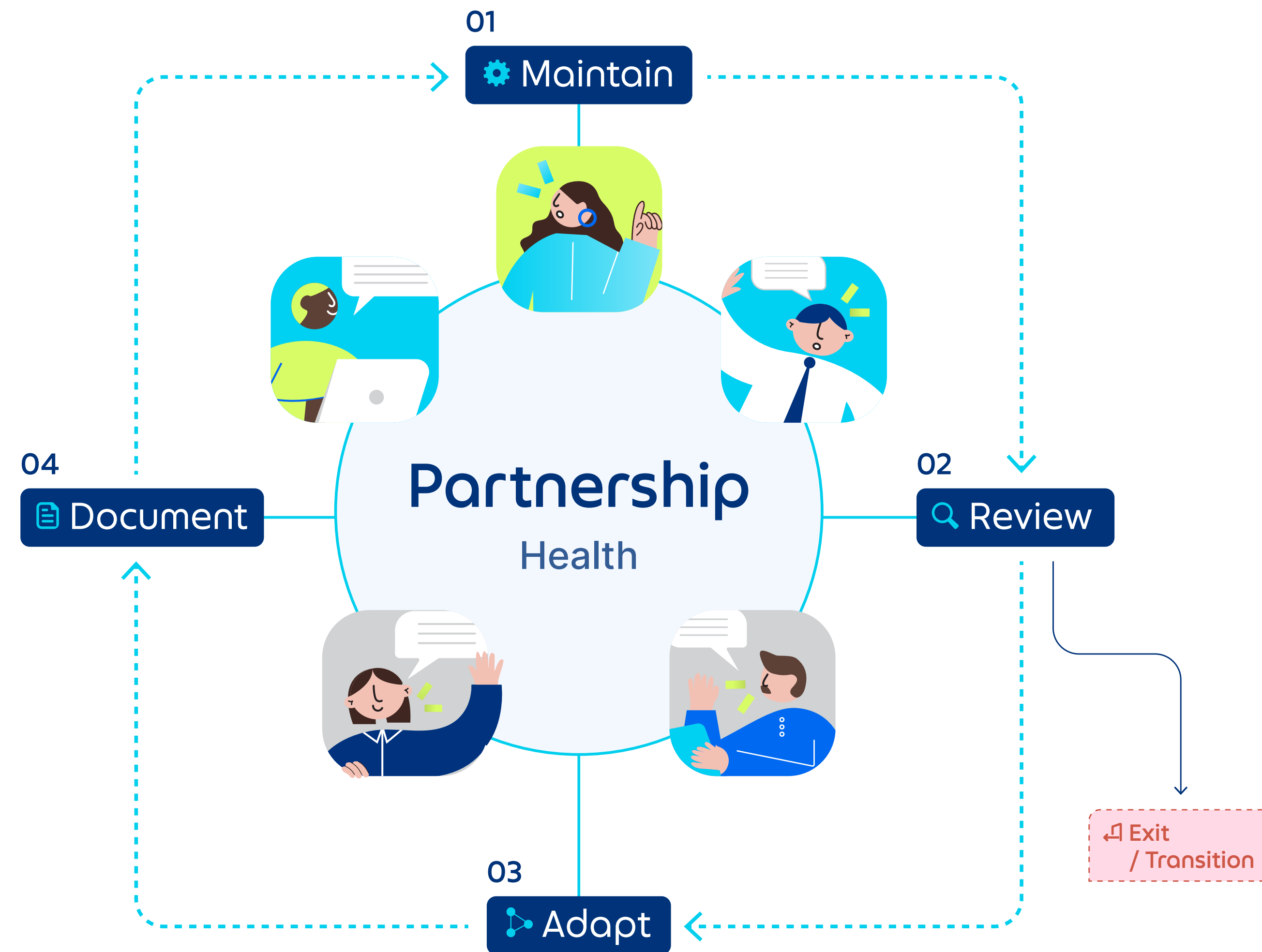
PG 41



FINISH!



Partnership Lifecycle Sustainability Cycle



Step 1 of 2

Long-Term Partnership Management

Institutionalising active partnership management through dedicated roles, regular reviews, and systematic documentation ensures the robustness of partnerships.

Active Maintenance Elements

- **Relationship managers:** Designated officials maintaining regular communication and coordination on both sides
- **Strategic reviews:** Semi-annual or annual comprehensive assessments of partnership direction and continued alignment
- **Institutional memory:** Documentation of decisions, lessons learned, and operational knowledge that is not dependent on individuals

Adaptation and Continuous Improvement

- **Program reviews:** Systematic assessment of successes, challenges, and improvement opportunities, not just performance reporting
- **User feedback integration:** Formal processes for analysing and acting on citizen input throughout the partnership lifecycle
- **Technology refresh cycles:** Planned updates to systems, security protocols, and interfaces, to avoid technical debt
- **Policy alignment reviews:** Periodic assessment of continued alignment with government priorities, especially after elections

These adaptation mechanisms are integral to relationship management. Each ensures both parties continuously realign on objectives, surface emerging frictions early, and refresh the partnership's institutional foundations.

Step 2 of 2

Exit Strategies and Transition Planning

Well-structured partnerships include provisions for their conclusion or transition from the outset. Exit planning reflects governance maturity rather than failure. Transparent transition processes support orderly off-boarding and preserve the value created for citizens.

The Wrong Assumption:

Exit means failure



Partnerships should run indefinitely



Exit planning signals a lack of commitment



Governance Maturity:

Exit reflects the meeting of policy objectives



Well-structured partnerships include planned transitions



Transparent exit preserves public value



Exit & Transition Planning Canvas

 45 mins

Complete during formalisation **(Phase 3)**, not when an exit is imminent. Use scenario-based discussion: the facilitator presents each trigger condition, and both parties draft responses.

Government Capability Internalisation

Building Government's Own Capacity



1

What skills, systems, or processes will the government develop through this partnership to operate more independently in the future? What training programmes are needed?

Transition to Alternative Models



2

Could this partnership eventually evolve from a single-platform arrangement to a competitive multi-platform ecosystem? What conditions or milestones would trigger this transition?

Programme Conclusion

Defining 'Done'



3

When will the partnership's primary objective be considered achieved? State-specific, measurable criteria for concluding the programme.

Structured Off-boarding

Winding Down Responsibly



4

What are the step-by-step protocols for data migration, service continuity, and knowledge transfer when the partnership ends? How will citizen services be maintained during the transition period?

Archival and Documentation

Preserving What Was Learned



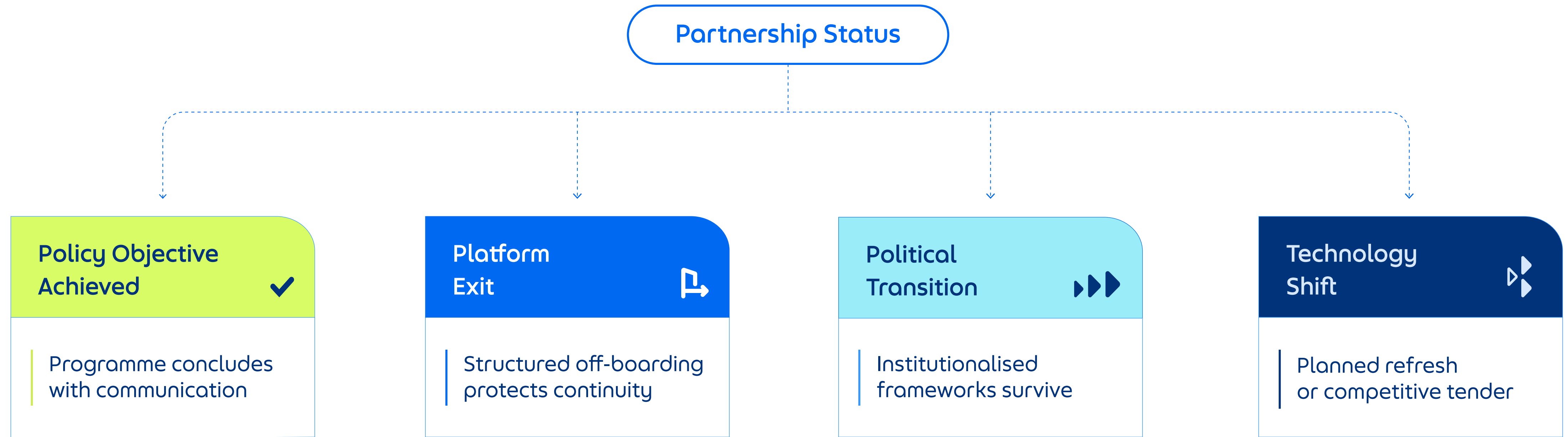
5

What records, lessons learned, and operational knowledge will be documented? How will this knowledge base be made accessible for future partnerships or initiatives?

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

Transition Trigger Conditions





Final

Complete Pathway Checklist



Use this checklist at phase transitions. The pathway is not prescriptive. Apply judgment about which items are mandatory versus advisory, given your partnership’s specific scope and context.

Phase 01 **Foundation & Assessment** Pg 10

Phase 03 **Formalisation & Scaling** Pg 29

Phase 02 **Piloting** Pg 21

Phase 04 **Sustainability & Evolution** Pg 36

Full Pathway Progress Tracker



Draw a tick to mark complete
Use any pen

Fill circle with yellow highlighter
Use a marker or highlighter pen

✓ Phase 01 Foundation & Assessment

- Partnership explicitly linked to a named national policy framework or strategy
- Purpose Alignment Canvas completed with both government and platform stakeholders
- Government Readiness Assessment completed with all six dimensions scored and solutions to gaps identified
- Platform Capability Mapping completed and shared with the government counterpart
- Both parties can independently describe the partnership's purpose and what each side brings, and descriptions align without significant divergence
- Policy objective, governance lead, and legal framework are all confirmed
- Lead agency identified and personnel formally assigned
- Platform leadership committed to engagement for at least two to three years
- All relevant stakeholders mapped and at least one round of consultation completed
- Engagement plan agreed with named contacts and scheduled touchpoints

✓ Phase 02 Piloting

- Regulatory sandbox or proportionate testing mechanism designed with supervisory oversight
- Pilot scope clearly defined: specific geography, user population, service offering, and duration
- Success metrics set before pilot launch across process, outcome, and equity dimensions
- Learning agenda documented with explicit questions that the pilot aims to answer
- Iteration mechanisms established: review cadence, decision authority, and stop/go criteria defined
- Non-negotiable governance essentials (data privacy, security, consent) implemented and verified in practice
- Data Sharing and Data Privacy Canvas completed collaboratively, covering all six sections
- Data governance framework agreed with privacy-by-design principles and compliance verification procedures
- Pilot results meet the success criteria that were set before launch
- Learning agenda questions answered with documented evidence and data
- Both parties have formally agreed to proceed to formalisation and scaling

✓ Phase 03 Formalisation & Scaling

- Formal agreement signed with defined roles, responsibilities, and metrics
- Governance structure operational at an appropriate level of formality for the partnership's complexity
- Data governance framework updated from pilot phase, fully deployed with all six canvas areas addressed, and verified through audit
- Risk management plan completed for all five categories (technical, cybersecurity, adoption, regulatory, dissolution) with designated owners
- Scaling plan progressing against milestones with metrics actively tracked
- Three metric categories (platform, policy outcome, equity) tracked simultaneously
- Public communication strategy launched jointly with the platform

✓ Phase 04 Sustainability & Evolution

- Dedicated relationship managers designated on both government and platform sides
- Strategic review schedule established with defined review criteria
- Documentation processes are formalised and not dependent on individuals
- Adaptation feedback loops active: programme reviews, user feedback, technology refresh, policy alignment
- Exit or transition plan documented with all five canvas areas addressed
- Knowledge base archived and accessible for future partnerships or initiatives

Diagnostic Questions by Phase

Use these questions at phase transitions, in preparation for key meetings, or as a periodic health check.

PHASE 01 Foundation	PHASE 02 Piloting	PHASE 03 Formalisation	PHASE 04 Sustainability
01 Has the Purpose Alignment Canvas been completed, and can both parties independently describe the partnership's purpose and what each side brings? <input type="checkbox"/>	01 Has a regulatory sandbox or proportionate testing mechanism been designed with supervisory oversight? <input type="checkbox"/>	01 Has a formal agreement been signed and is the governance structure operational at an appropriate level of formality? <input type="checkbox"/>	01 Have dedicated relationship managers been designated on both government and platform sides? <input type="checkbox"/>
02 Has the Government Readiness Assessment been scored across all six dimensions, with a Readiness Improvement Canvas completed for any dimension scoring 3 or below? <input type="checkbox"/>	02 Has the Pilot Program Design Canvas been completed, with scope, success metrics, learning agenda, and iteration mechanisms all defined before launch? <input type="checkbox"/>	02 Has the Data Sharing and Data Privacy Canvas been updated from the pilot phase and verified through audit? <input type="checkbox"/>	02 Has a strategic review schedule been established, and are adaptation feedback loops (programme reviews, user feedback, technology refresh, policy alignment) active? <input type="checkbox"/>
03 Has the Platform Value Assessment been completed and shared with the government counterpart? <input type="checkbox"/>	03 Has the Data Sharing and Data Privacy Canvas been completed collaboratively, covering all six sections? <input type="checkbox"/>	03 Has the risk management plan been completed for all five categories (technical, cybersecurity, adoption, regulatory, dissolution) with designated owners? <input type="checkbox"/>	03 Are documentation processes formalised and independent of individuals? <input type="checkbox"/>
04 Have all relevant stakeholders been mapped using the RACI framework, and has at least one round of structured consultation been completed? <input type="checkbox"/>	04 Are all non-negotiable governance essentials (privacy impact assessment, data minimisation, security standards, user consent) verified in practice? <input type="checkbox"/>	04 Is the scaling plan progressing against geographic and feature milestones, with all three metric categories (platform, policy outcome, equity) tracked simultaneously? <input type="checkbox"/>	04 Has the Exit and Transition Planning Canvas been completed with all five areas addressed? <input type="checkbox"/>
05 Are the policy objective, governance lead, and legal framework all confirmed? <input type="checkbox"/>	05 Do pilot results meet the success criteria set before launch, and has the learning agenda been answered with documented evidence? <input type="checkbox"/>	05 Has a public communication strategy been launched jointly with the platform? <input type="checkbox"/>	05 Has a knowledge base been archived and made accessible for future partnerships? <input type="checkbox"/>
06 Have the lead agency and personnel been formally assigned, with an engagement plan agreed with named contacts and scheduled touchpoints? <input type="checkbox"/>	06 Have both parties formally agreed on a decision to scale, iterate, or conclude? <input type="checkbox"/>		

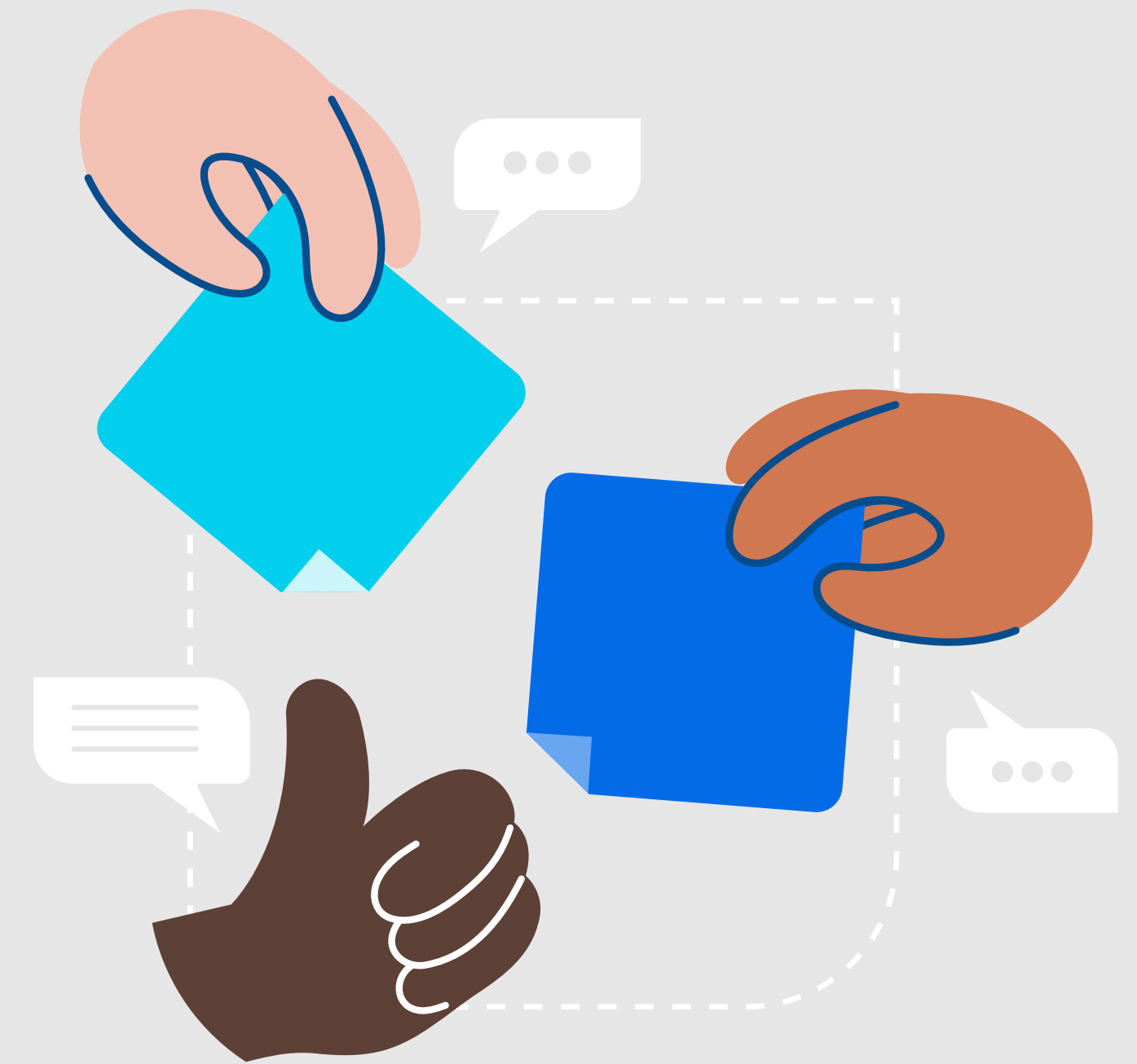
Key Insight

Inability to answer a question confidently signals that further work is needed before proceeding.



Activity

Printable Templates



Step 1 of 3

Establish Clear Purpose

Clear purpose anchors sustained partnerships by providing platforms with clarity on strategic policy objectives. Partnerships that explicitly connect to defined national development objectives, such as financial inclusion or economic data collection, gain strategic coherence. Connecting partnerships to strong national development frameworks increases the chances of continuity across political transitions and provides platforms with the certainty needed for effective resource allocation.

Purpose Alignment Canvas

 60 mins

Align government and platform stakeholders on the core purpose.

Participants use silent brainstorming to write answers individually **(5 min)**, then share them with the group to test whether all parties agree on the fundamental objectives **(40 min)**.

Finally, draw visual connections between the mapped quadrants to demonstrate the strategy's cohesion **(15 min)**. This exercise minimises groupthink and helps draw links between national policy objectives and the partnership.

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

What national development objective does this partnership advance?

Name the specific goal: e.g. financial inclusion target, digital skills goal, economic data collection, social protection reach.

1

Which existing national policy framework anchors this partnership?

Link to a published national development strategy, digital economy blueprint, or sector-specific policy document.

2

Why is a platform partnership the right approach for this objective?

What specific infrastructure, reach, or expertise does the platform bring that the government cannot build independently in the required timeframe?

3

What does success look like in 12 months? In 3 years?

Define outcomes in policy terms (e.g., the number of citizens reached, the percentage improvement in access)

4

Step 2A of 3

 Government Readiness Assessment 30 mins

Assess your government's readiness to enter and sustain a platform partnership. Candid self-assessment is essential; overestimating readiness is the most common cause of partnership failure at this stage. Rate each dimension on a scale of 1 to 5, where 1 means least ready and 5 means fully ready. Note specific gaps to address before proceeding.

Dimension	Key Question	Score	1 = Least ready 5 = Fully Ready				
Policy Mandate Clarity	<i>Are there clear political commitments and approved policy frameworks that explicitly support this type of partnership?</i>	1	2	3	4	5	
Institutional Capacity	<i>Has a lead agency been identified which has the technical expertise, legal authority, and a dedicated team to manage this partnership?</i>	1	2	3	4	5	
Legal Framework	<i>Do existing laws permit this partnership model? Are data protection regulations clear enough to proceed?</i>	1	2	3	4	5	
Procurement*	<i>Do procurement rules and regulatory requirements accommodate this type of collaboration?</i>	1	2	3	4	5	
Resource Commitment	<i>Can the government commit sufficient budget, personnel, and technical resources for at least two to three years?</i>	1	2	3	4	5	
Political Sustainability	<i>Is the partnership embedded in institutional frameworks (not dependent on individual champions) with enough cross-party support to survive electoral transitions?</i>	1	2	3	4	5	

----->

**PROCEED TO READINESS
SCORE VISUAL GAUGE**

Step 2A of 3

Readiness Score Visual Gauge

Sum your scores across all six dimensions for a total readiness score out of 30.

Score Bands

24 - 30 Strong readiness, proceed to pilot design.

17 - 23 Targeted gaps, address weaker dimensions before piloting.

Below 17 Foundational work needed before the partnership progresses.

Note

* A low score on Procurement should be treated as a blocker regardless of total.



PROCEED TO READINESS IMPROVEMENT CANVAS

Policy Mandate Clarity -----

Institutional Capacity -----

Legal Framework -----

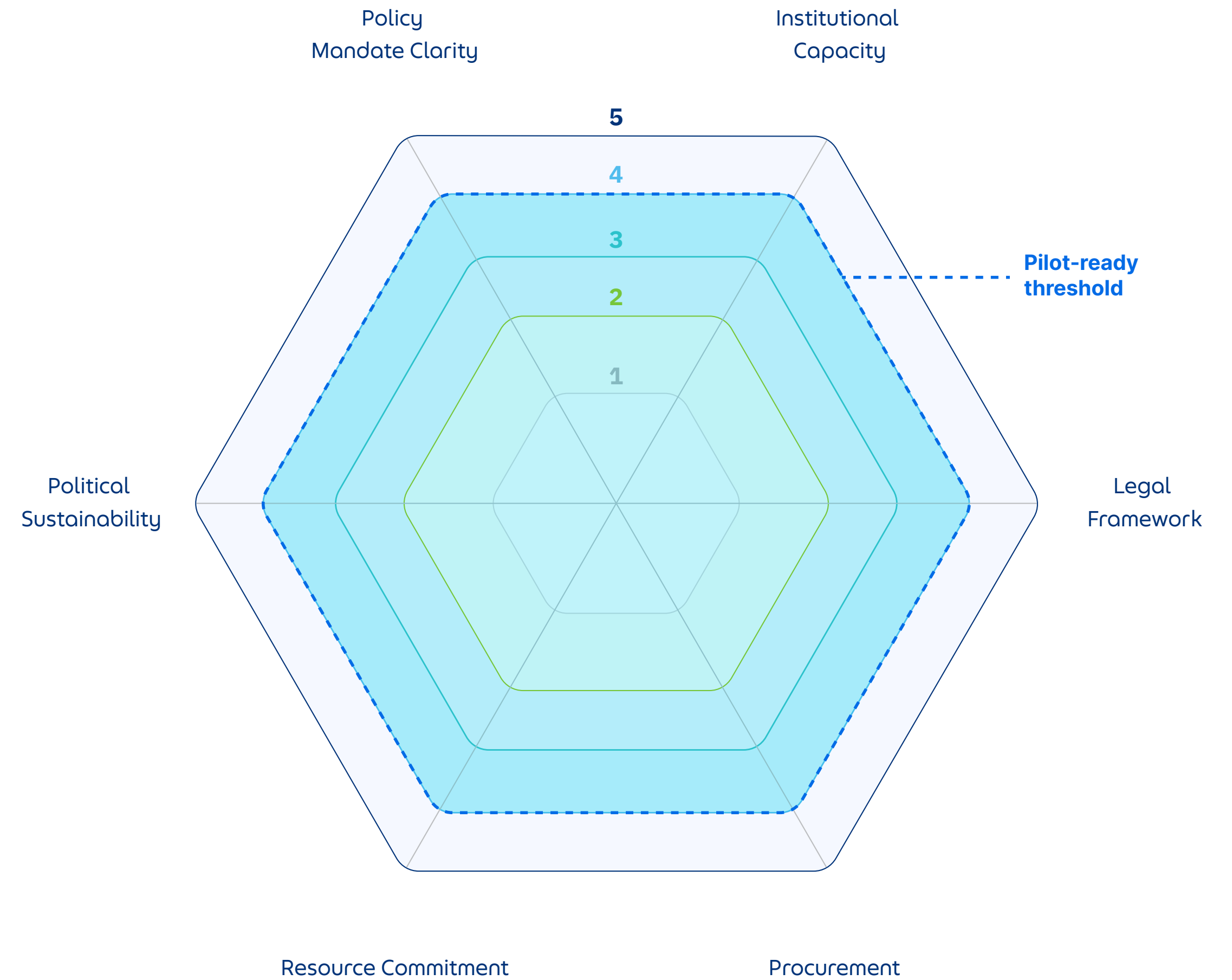
Procurement* -----

Resource Commitment -----

Political Sustainability -----

Total Score | -----

Readiness Score Gauge








Step 2A of 3

Readiness Improvement Canvas

 45 mins

For any dimension where you scored 3 or below, use this canvas to develop a concrete action plan. Use colour-coded sticky notes on a shared board (physical or digital). Each step builds on the previous one.

Score	Improvement Plan	Readiness Improvement Canvas
1	<p>Identify hurdles and bottlenecks</p> <hr/> <p>What is preventing this dimension from scoring higher?</p> <p> Use red sticky notes.</p>	<div style="border: 1px dashed gray; padding: 20px; min-height: 600px;"> <p style="text-align: center;">Action Plan</p> </div>
2	<p>Identify how to overcome or mitigate</p> <hr/> <p>For each hurdle, what solutions or workarounds exist?</p> <p> Use yellow sticky notes.</p>	
3	<p>Identify supporting agencies</p> <hr/> <p>Which agencies or individuals need to be involved to support this mitigation?</p> <p> Use green sticky notes.</p>	
4	<p>Select the top 3 actions</p> <hr/> <p>What are the top 3 actions you can take or engage with stakeholders to mitigate these hurdles?</p> <p> Use purple sticky notes.</p>	
5	<p>Prioritise for the next 12 months</p> <hr/> <p>Which actions can be completed within 12 months with these stakeholders?</p> <p> Use blue sticky notes.</p>	

Step 2B of 3

Platform Value Assessment

45 mins

Document what the platform brings to this partnership. Platform stakeholders complete each quadrant individually (20 min) and present to the government counterpart for joint review and discussion (25 min).

Format inspired by the Strategic Partnerships framework: each quadrant maps a platform value dimension against a specific public policy need.



Step 3 of 3

Stakeholder Mapping

60 mins

Map out key cross-functional stakeholders and their level of project responsibility. Identify stakeholders, teams and the nature of involvement. Place them on the map according to their involvement, and use markers to highlight key aspects (45 min). Then share with the wider teams to ensure alignment (15 min).

Format inspired by the RACI matrix: the visual map guarantees strong cross-functional representation and helps prevent critical knowledge gaps.

Responsible

Doing the work - The core team, generally

Accountable

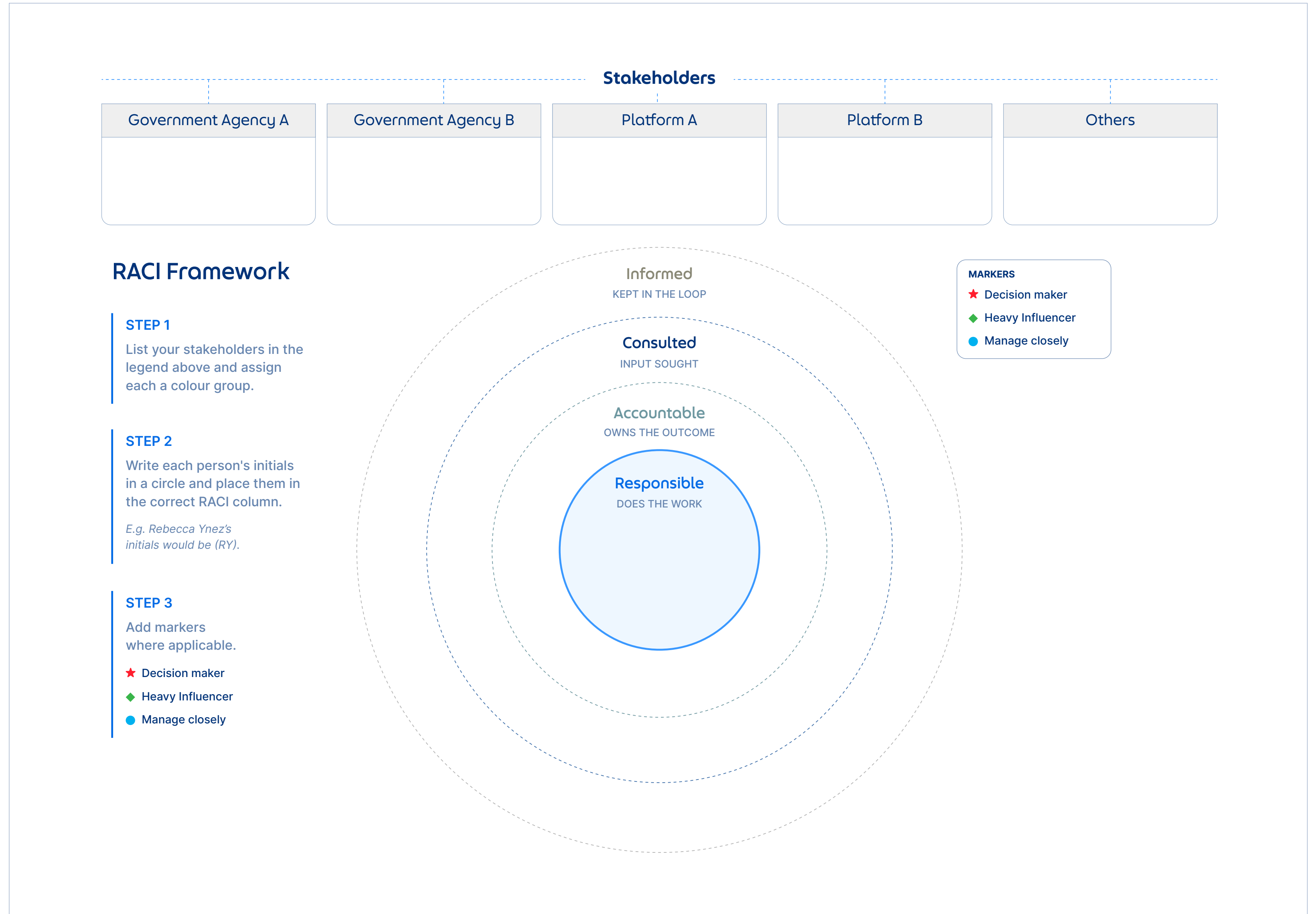
Answers for the work - often leadership

Consulted

Experts/MSMEs to learn from

Informed

Kept in the loop



Step 2 of 3

Pilot Program Design Canvas

Effective pilots share four design characteristics, all of which should be defined before launch. Setting metrics retrospectively invites confirmation bias and undermines the pilot's value as a learning exercise.

Defined Scope

1

Set clear boundaries for what the pilot will and will not cover.

Geography _____

User Population _____

Service Offering _____

Duration _____

Success Metrics – Set before launch

2

How will you know if this pilot worked? Define metrics now to avoid confirmation bias later.

Process metrics _____

Outcome metrics _____

Equity metrics _____

Learning Agenda

3

What specific questions does this pilot aim to answer? These are the unknowns you need to resolve before scaling.

Q1 _____

Q2 _____

Q3 _____

Q4 _____

Q5 _____

Iteration Mechanisms

4

How will you adjust the course during the pilot? Define who can make changes and what would trigger a pause.

Review cadence _____

Who has authority to change the pilot _____

Stop/go criteria _____

----->
PROCEED TO PILOT DECISION TREE

Step 3 of 3

Data Sharing and Data Privacy Canvas

Data governance underpins credibility in government-platform partnerships. All partnerships must be built on a 'privacy-by-design' foundation, with clear agreements specifying what data is shared, for what purpose, and under what protections.

 60 mins

Establish clear protocols and boundaries before deploying the data-sharing framework. A paired team of government and platform representatives works through all six sections together (45 min), and then jointly validates the completed canvas to ensure absolute alignment (15 min). Format inspired by data governance canvases: this collaborative exercise mitigates compliance risks, guarantees mutual understanding of data usage, and ultimately serves as a formal annex to the partnership agreement.

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

Data Minimisation

What specific data fields are strictly necessary for the partnership's objectives? List what will NOT be collected. Define the boundaries of how data may be used (purpose limitation).

1

Purpose & Legal Basis

What will the data be used for, by whom, and for what objectives? This must be specified before or at the time data is collected. **Note***: respect the platform's legal rights to proprietary data and intellectual property.

State precisely!

2

Aggregation & Anonymisation

Which data will be shared only in aggregate (summary) form rather than as individual records? What techniques will be used to anonymise data (e.g. k-anonymity, differential privacy)?

3

Security Standards

Encryption standards, who has access (access controls), audit logging, and intrusion detection systems. Include breach notification timelines (e.g. within 72 hours) and response procedures.

Specify!

4

Oversight Mechanisms

Who will verify compliance: an independent audit team, an external reviewer, or a regulatory body? How often will audits occur? How will findings be reported?

5

Data Retention & Deletion

How long will data be retained? What is the maximum retention period that allows identification of individuals? Describe the secure deletion procedures when data is no longer needed.

6

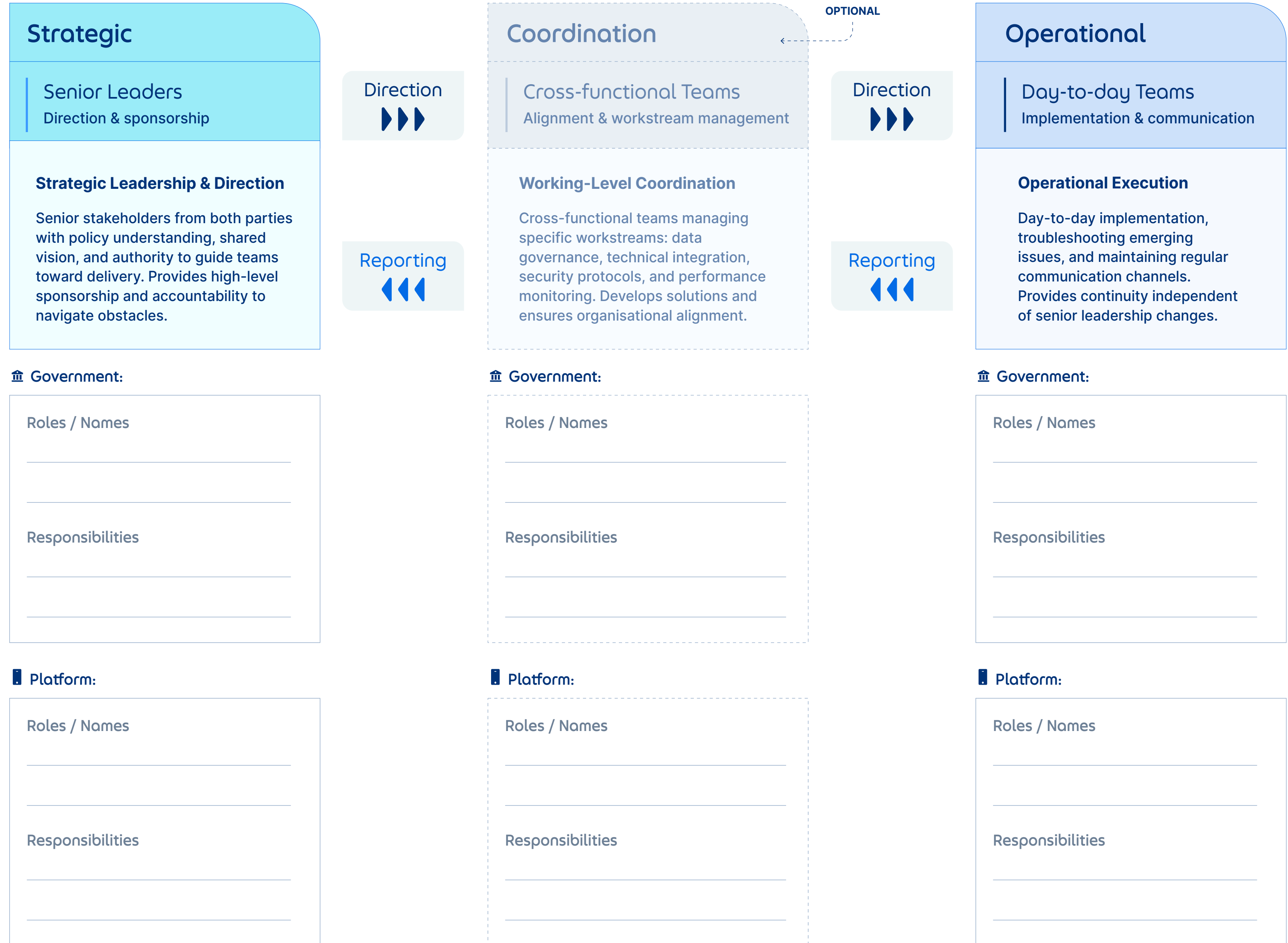
Step 1 of 3

Partnership Formalisation and Governance Structures

Governance structures should prioritise clarity over procedural complexity. Relationships must be formalised through agreements that define roles, responsibilities, data governance provisions, and success metrics. The level of governance formality should be proportionate to the partnership's complexity; straightforward collaborations may require only lightweight coordination mechanisms. Overall, building strong governance structures early provides the opportunity to transition from reactive improvisation to proactive institutionalisation.

Note

Scale formality to the partnership's complexity — not every partnership needs all three tiers. *Tip: Start with Operational + Strategic only. Add coordination tier as complexity grows.



Step 2 of 3

Reviewing Data Sharing and Data Privacy Canvas

Review the 'Data Sharing and Data Privacy Canvas' completed during the **Pilot phase (Phase 2)** and update it to meet the needs of this stage. Ideally, compliance is ensured through audits.

Step 3 of 3

Risk Management and Scaling Mechanisms Mapping

Both parties collaboratively identify potential risks and develop corresponding mitigation strategies before scaling. Pre-emptive risk assessment supports public trust and service continuity. This register provides potential examples that should be populated jointly. Both parties should also add or remove risk descriptions accordingly, based on the nature of the project.

01

Identify risks together.

02

For every risk you find, write down how you'd handle it and who owns the response.

03

The register below gives you examples to start from. Add, remove, and edit to fit your project.

Risk Category	Description & Indicators	Mitigation Owner	Contingency Plan
Technical Failure	System downtime, data backup failures, or service outages during high-demand periods.	_____	_____
Cybersecurity Threat	Data breach, incident detection gaps, or failure to act on threat intelligence.	_____	_____
Low Adoption	Below-target uptake due to poor UX, lack of awareness, or exclusionary eligibility criteria.	_____	_____
Regulatory Change	New laws or policy changes require agreement renegotiation or increasing compliance costs.	_____	_____
Partnership Dissolution	Key personnel departure, political or leadership change, or commercial decision to exit.	_____	_____
		_____	_____

Exit & Transition Planning Canvas

 45 mins

Complete during formalisation **(Phase 3)**, not when an exit is imminent. Use scenario-based discussion: the facilitator presents each trigger condition, and both parties draft responses.

Government Capability Internalisation

Building Government's Own Capacity

What skills, systems, or processes will the government develop through this partnership to operate more independently in the future? What training programmes are needed?

1

Transition to Alternative Models

Could this partnership eventually evolve from a single-platform arrangement to a competitive multi-platform ecosystem? What conditions or milestones would trigger this transition?

2

Programme Conclusion

Defining 'Done'

When will the partnership's primary objective be considered achieved? State-specific, measurable criteria for concluding the programme.

3

Structured Off-boarding

Winding Down Responsibly

What are the step-by-step protocols for data migration, service continuity, and knowledge transfer when the partnership ends? How will citizen services be maintained during the transition period?

4

Archival and Documentation

Preserving What Was Learned

What records, lessons learned, and operational knowledge will be documented? How will this knowledge base be made accessible for future partnerships or initiatives?

5

Tip

Complete all fields collaboratively. Use sticky notes for brainstorming, then transfer agreed answers.

Use this checklist at phase transitions. The pathway is not prescriptive. Apply judgment about which items are mandatory versus advisory, given your partnership’s specific scope and context.

Phase 01 Foundation & Assessment Pg 10

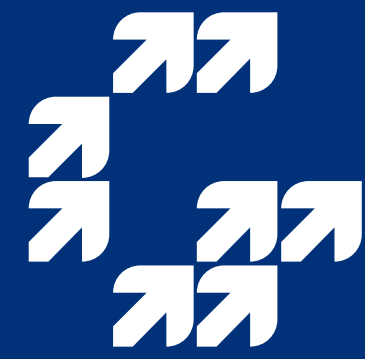
Phase 03 Formalisation & Scaling Pg 29

Phase 02 Piloting Pg 21

Phase 04 Sustainability & Evolution Pg 36

Full Pathway Progress Tracker





**TECH FOR
GOOD
INSTITUTE**