

Competitiveness and artificial intelligence in the EU's future strategy

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ABSTRACT

In this chapter, we focus on the latest EU high-level reports that aim to address the role of artificial intelligence (AI) in promoting European competitiveness and upholding European values. Published before the current European Commission's appointment, the reports offer substantial guidelines for the upcoming EU policies. We concentrate on the Draghi report and discuss the Letta and Niinistö reports, all of which develop the political plans of the President of the European Commission presented in July 2024. The chapter provides a critical assessment of their assumptions and solutions, and we develop three main arguments. One, the reports endorse techno-solutionism, portraying AI as the latest driver for growth and competitiveness; however, this clashes with the EU's aim to strengthen European values. Two, they focus on the EU, the US, and China, ignoring the broader global context. Three, they portray the EU as a single entity, disregarding the internal dynamics and what the proposed strategies will mean for smaller member states.

KEYWORDS: European values, artificial intelligence, EU digital strategy, Draghi report, EU Artificial Intelligence Act

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Introduction

Today, it is difficult to make a clear distinction between strategies and policies that concern digitalisation in a general sense and digital platforms and artificial intelligence (AI) specifically. Although the history of AI dates back to the 1950s, it remains a contested concept, a quality that allows it to be invoked across a range of economic, political, and cultural narratives (e.g., Bareis & Katzenbach 2022; Suchman 2023). From its beginning, digitalisation has been based on different applications of AI (from the “weak” or “narrow” to “strong” or general AI). From the viewpoint of social media platforms, there is a strong link between platforms and general AI: On the one hand, AI needs data generated by and through the platforms to sophisticate and train its applications (e.g., ChatGPT and DeepSeek), and on the other, social media applications are increasingly dependent on AI when moderating content and improving their algorithms to be more addictive (e.g., X and TikTok). In short, digitalisation is about the development and expansion of AI; concomitantly, AI depends on data produced through and retrieved from social media platforms (Andersson Schwarz, 2022). Because of this interconnectedness, we need a holistic approach to digitalisation to understand European challenges in regulating social media platforms and AI.

In this chapter we concentrate on the most recent initiatives concerning the EU’s digital strategy and AI policy. The EU has long been interested in AI’s possibilities for promoting the Union’s strategies. For example, AI is a central element in the EU’s 2030 Digital Compass (European Commission, 2021a), which outlines the Union’s general policy on applying digital technology in all its activities. On the other hand, the EU has been keenly aware of the problems involved in the non-regulated application of AI, which was the primary motivation behind the approval of the EU’s AI Act (European Union, 2023). The Act’s main stated intention was to increase democratic accountability for both the development and the use of AI, specifically addressing the leading US-based AI developers and service providers.

The EU’s stated emphasis regarding AI has consistently been on promoting European values, defined in the Treaty on European Union as follows:

The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail. (European Union, 2016: Article 2)

Following this, the AI Act stipulates that AI systems in the Union must,

in accordance with Union values, [...] promote the uptake of human centric and trustworthy artificial intelligence (AI) while ensuring a high

level of protection of health, safety, fundamental rights as enshrined in the Charter of Fundamental Rights of the European Union (the “Charter”), including democracy, the rule of law and environmental protection, [...] protect against the harmful effects of AI systems in the Union, and [...] support innovation. (European Union, 2023: Recital 1; see also European Commission, 2020, 2021b)

The requirement that “AI should be human-centric technology” is stressed again: “it should serve as a tool for people, with the ultimate aim of increasing human well-being” (European Union, 2023: Recital 6; see also European Union, 2023: Recitals 2, 4, 7–9).

Given that the EU AI Act has already been well analysed in other contexts (e.g., Gstrein et al., 2024), we concentrate on three recent EU high-level proposals regarding how AI should best be applied to solve Europe’s main economic challenges and propagate Europe’s values globally. As the reports were published before the appointment of the new European Commission for 2024–2029, they are highly significant in outlining the forthcoming EU policies concerning European digitalisation, platformisation, and AI, and the place of European values in them. All major EU regulations concerning platforms, digitalisation, and AI – the Digital Services Act (DSA), the Digital Markets Act (DMA), and the EU AI Act (see below) – are still in the early stages of their execution, and the new Commission will be instrumental in their practical implementation. In light of the recent transformations in the US policies – due to Donald Trump’s second presidency and the strong influence of the representatives of the so-called Magnificent Seven (i.e., Apple, Microsoft, Amazon, Alphabet, Meta, Nvidia, and Tesla) in and over his administration – we can predict increasing pressure from both European digital industry and the American tech companies to loosen the democratic and social commitments embedded in EU regulation (see also The Economist, 2025).

Although the central elements of the reports were already adopted by the president of the European Commission, Ursula von der Leyen (2024), for her political guidelines for the new European Commission (*Europe’s Choice*), presented in July 2024, the reports flesh out the work of the new Commission that was inaugurated in November 2024. Specifically, we focus on three seminal documents: 1) *The Future of European Competitiveness*, by Mario Draghi (September 2024; former president of the European Central Bank and former prime minister of Italy), commissioned by von der Leyen; 2) *Much More Than a Market*, written by Enrico Letta (April 2024; also a former prime minister of Italy), commissioned by the European Council; and 3) *Safer Together: Strengthening Europe’s Civilian and Military Preparedness and Readiness*, written by Sauli Niinistö (October 2024; former prime minister of Finland), commissioned by von der Leyen. The influence of these documents is clearly reflected in the new Commission’s strategic planning, which has informed our selection (see European Commission, 2025a, 2025b).

The main themes of these reports are not new. Weakened European competitiveness has been a recurring theme since the 1970s (see Michalis, 2007). In general, the numerous reports on the subject compare the EU primarily with the US within a changing geopolitical context, identify the same causes, and propose a broadly technology-inspired solution. The latest technological iteration is AI.

We ask two questions in this chapter:

- What solutions are presented in these three latest strategic reports for overcoming the existing European political and socioeconomic malaise?
- What role is allocated to AI and the so-called European values in these solutions?

Using textual analysis as a method, we compare the values articulated in the reports with the EU's core values as stipulated in the Treaty on European Union (2016) to identify tensions and gaps in their underlying argumentation and explore the “sociotechnical imaginaries” – imagined sociotechnical futures – that the reports present (Felt & Wynne, 2007; Jasanoff & Kim, 2015).

The reports are examined following a reverse chronological order, starting with the most recent and, for our purposes, most significant. Next, we offer a critical assessment of the assumptions and proposed solutions of the reports before our conclusion.

The Draghi report: EU challenges and opportunities in the evolving technological and geopolitical context

The so-called Draghi report starts by highlighting Europe's strengths, including its single market, which accounts for around 17 per cent of the global GDP; low levels of inequality compared to its main rivals, the US and China; democratic governance and high levels of social protection; and leadership in sustainability. Yet, it warns that Europe's economic growth is lagging behind the US and China, primarily because of diminishing productivity: During the two decades from 2002 to 2023, the EU–US gap in GDP widened from 15 to 30 per cent, with 70 per cent of this gap attributed to slower EU productivity (Draghi, 2024: 8).

The report states that three external factors have exacerbated this gap between the EU and the US. First, the decline in global trade relations and the rise of protectionism have weakened European companies, which, after the collapse of the Soviet Union in 1991, benefited from an open global economy. Second, the EU's reliance on cheap energy from post-Soviet Russia ended following the invasion of Ukraine in 2022. Third, the post-Cold War “peace dividend” that allowed for reduced military spending has eroded as growing geopolitical instability has necessitated a renewed focus on security and military spending (Draghi, 2024: 9).

To address Europe's sluggish economic growth, the Draghi report proposes three major transformations. First, Europe must accelerate innovation and

“find new growth engines”, particularly in advanced technologies. It notes that the EU’s share of global tech revenues dropped from 22 to 18 per cent between 2003 and 2023, while the US’s share rose from 30 to 38 per cent (Draghi, 2024: 10). However, the report suggests that with AI driving the next “digital revolution”, the EU has an opportunity to catch up by stimulating innovation and productivity and restoring its manufacturing potential (Draghi, 2024: 10).

The second transformation concerns the green energy transition and the shift to a circular economy. Europe faces significantly higher energy costs in the post-Cold War era of the 2020s than the US does. However, the report recognises that although the EU is on the way to taking the lead in decarbonisation and clean technologies, China’s massive state-led investment and innovation in this space, together with the control of strategic raw materials and the benefit of scale, pose a significant competitive challenge (Draghi, 2024: 10–11).

Third, the EU must mitigate the high level of “strategic interdependence” whereby, for instance, the EU depends on China for critical minerals, and China depends on the EU’s ability to absorb its industrial overcapacity. Reducing these interdependencies requires, among other things, the diversification of supply routes for critical raw materials and investment in Europe’s security and military industries (Draghi, 2024: 52–57).

To improve on the EU’s fragmented and uncoordinated response to these challenges, the report proposes a new industrial strategy as an overall goal for Europe based on four pillars:

- full implementation of the single market (further elaborated in Letta, 2024);
- close coordination between industrial, competition, and trade policies;
- development of an EU financing mechanism to meet the massive investment needs in the European ICT sector, estimated at around five percentage points of the EU GDP annually (approx. 750 to 800 billion euros); and
- governance reform to promote coordination and reduce the regulatory burden. The reform implies a shift of decision-making power away from the “Community Method” that requires unanimity in decision-making towards the European Commission and a more consolidated European market, consisting of “European champions” capable of competing with the US and China (Draghi, 2024: 13–14, 18, 67–69).

As demonstrated here, the report primarily focuses on economic growth and competitiveness. Almost as a footnote, Draghi’s report acknowledges the need to preserve European social inclusion. It warns against following the US’s example, where economic growth has come at the cost of growing inequalities. Stressing the vital need to safeguard European social values, the report calls for a new approach to labour skills and retraining. It suggests that the EU’s cohesion policy must refocus on providing investment and reforms at the

subnational level, not just metropolitan regions, in areas such as education, transport, housing, digital connectivity, and planning (Draghi, 2024: 15).

Finally, the Draghi report warns against the experience during the “hyper-globalisation” phase before the 2008–2009 financial crisis, characterised by weak public support and increased inequalities. Instead, it advocates “empowering people” by encouraging proactive citizen involvement and social dialogue between trade unions, employers, and civil society (Draghi, 2024: 15). However, the report neither makes any concrete recommendations for meeting this goal nor offers any assessment of how the proposed changes would affect European social values and their practical implementation.

Digital technology and AI in the assistance of transformations

Having outlined the key themes in the Draghi report, we now turn to the role of digital technology and AI within it, as well as in other recent seminal EU documents, notably the reports by Enrico Letta and Sauli Niinistö, and the statement by von der Leyen.

The Draghi report and the problem with EU’s productivity

The starting point of the Draghi report is the observation that the main explanatory factor of why the EU is severely lagging in productivity in comparison to the US and China is Europe’s slow adoption of digital technology, including AI. More specifically, the report attributes the EU’s innovation gap with the US primarily to its failure to capitalise on “the first digital revolution” led by the Internet (see Nieminen et al., 2023). In fact, discounting the tech sector, EU productivity over the past 20 years would have been comparable to the US’s (Draghi, 2024: 20).

Other recommendations that more directly relate to digital technology and AI include enforcing the EU’s strategic autonomy, strengthening Europe’s research and innovation in digital technology, and relaxing EU regulations. These proposals correspond to an equal number of structural barriers. Next, we examine these barriers and objectives in more detail.

The report identifies three structural barriers hindering European productivity and innovation. At the root of Europe’s weak performance is “a static industrial structure” whereby European investments have concentrated “on mature technologies and in sectors where productivity growth rates” are slowing, rather than innovative technologies and emerging sectors characterised by high-growth rates, as in the US (Draghi, 2024: 24). Besides, a focus on innovative technologies, including AI, links to EU’s strategic autonomy, which is all the more crucial in the rapidly changing geopolitical context, as noted. While recognising the US lead in many digital sectors, Draghi’s report proposes that Europe has opportunities to succeed in other areas by *applying* digital

innovation. For example, although it lags behind in cloud computing, the EU should continue developing its domestic tech sector and build a “sovereign cloud” solution for reasons such as security and encryption (Draghi, 2024: 20, 30). Other measures include safeguarding the supply of critical raw materials required for the European ICT industry, accelerating the shift to renewable energy sources, and making a massive investment in the European domestic defence industry (Draghi, 2024: 51, 55).

The report’s most concrete reference to AI is its call for “vertical integration” of AI within European industry to boost productivity (Draghi, 2024: 21). Although more exact estimates of AI’s effects on aggregate productivity are still unproven, the report proposes an “AI Vertical Priorities Plan” and sees substantial potential economic gains from accelerating the integration of AI in “strategic sectors” such as pharmaceuticals (gains of 60–110 billion US dollars in this sector alone), automotive, advanced manufacturing and robotics, energy, telecoms, agriculture, aerospace, defence, environmental forecasting, and healthcare (Draghi, 2024: 30). Indeed, in a few select segments, the EU can still take a leading position, such as in autonomous robotics (it hosts around 22% of the worldwide activity) and AI services (it holds around a 17% global market share). However, Europe’s inability to scale up and attract financial resources has impeded growth and is reflected in the productivity gap between the EU and the US.

While the advanced application of AI is deemed vital for Europe’s growth and competitiveness, it also poses a potential challenge to Europe’s social model. The American experience showed that, unlike the earlier stages of computerisation, the deployment of AI appears to threaten the jobs of higher-skilled workers especially. Simultaneously, according to a study referenced in Draghi’s report, although AI promises to increase the productivity of all workers, the group that benefits most are less-experienced or low-skilled workers (Draghi, 2024: 25; for a conflicting argument, see Sharps et al., 2024). The report recommends proactive policies, including adequate education and training, lifelong learning programmes, and measures to minimise any negative impacts on social inclusion.

A second related barrier is inadequate public support for European research and innovation. Such support has been too little, fragmented, and loosely focused on new, disruptive innovation. Moreover, again in contrast to the US and China, Europe is missing successful European innovation clusters – “networks of universities, start-ups, large companies and venture capitalists” – crucial for successful commercialisation in the high-tech sectors (Draghi, 2024: 25).

In response, one main recommendation that the report puts forward concerns the strengthening of Europe’s research and innovation in digital technology. This comprises the need for considerable investments in the European ICT sector and support for the creation of European champions capable of competing for leading positions globally; re-directing the EU’s research funding policy to support innovations that express commercial

potential by promoting the European equivalent of the US Advanced Research Projects Agency (pivotal for the development of the Internet from the 1960s to the 1990s; Draghi, 2024: 33); inviting a significantly higher number of private investments, especially for promoting innovation and ICT start-ups; and promoting the vertical integration of AI, particularly in the identified ten strategic sectors, mentioned above (Draghi, 2024: 34).

Finally, a third barrier concerns regulatory fragmentation and overload, which are particularly heavy in the ICT sector. With more than 270 regulators and around 100 tech-focused laws, the EU's overly cautious and *ex ante* regulatory approach creates obstacles, particularly for smaller companies, as exemplified by the much-criticised General Data Protection Regulation (GDPR) (see, e.g., Kuner et al., 2021; Mesarčík & Hamulák, 2024). Regulatory fragmentation and overreach, combined with the absence of a truly single market, deprive EU companies of scale and put them at a disadvantage relative to the US and China, which do not have similar restrictions (Draghi, 2024: 26). Again, this suggestion is not new; large European companies, especially in the field of ICT, often cite the lack of sufficient scale and weak innovation as arguments to free themselves from regulation and advocate for market consolidation (Michalis, 2016).

Regulatory reform primarily relates to the relaxation of EU regulations, which hinder the competitiveness of European digital technology companies, particularly SMEs in emerging sectors. The report suggests that one crucial way to lighten the regulatory burden is to move the emphasis from bureaucratic and slow *ex ante* regulation to *ex post* regulation (Draghi, 2024: 31, 46). However, such a shift in regulatory governance seems at odds with the recent flagship Digital Services Package adopted in 2022, comprising the DMA (European Union, 2022a) and the DSA (European Union, 2022b). The aim of this package, currently being implemented, is precisely to move towards proactive (*ex ante*) regulation in order to provide more certainty (Michalis, 2024).

In addition, regulatory reform involves amending (relaxing) data rules, among other laws, to improve European competitiveness in the health, pharmaceutical, automotive, and energy sectors, as well as in the development of European AI training models – and equally the rules on EU state aid policy, which should be directed to speed up the creation of European champions instead of supporting domestic industries (Draghi, 2024: 13, 30, 32, 34–35, 58, 68).

In sum, the Draghi report analyses Europe's economic challenges. It stresses the significance of digital transformation, particularly AI, in boosting productivity and growth and bridging the gap with the US and China. Realising this requires a substantial shift and increase of (public) financial investment in the ICT sector as well as structural and regulatory reforms whereby the EU embraces digital technology and AI and relaxes restrictive rules, particularly regarding data guardrails and state subsidies.

The Letta report and the fifth freedom to the single market on research, innovation, and education

Enrico Letta's report, *Much More Than a Market*, published a few months before Draghi's, is organically linked to Draghi's analysis and proposals. Letta (2024) concentrated mainly on the problems blocking the full implementation of the European single market. From the viewpoint of European digital and AI industries, the deficiencies of the EU's economy, which the Letta report focuses on, are primarily caused by the lack of integration in the financial, energy, and electronic communication sectors. Most of the report's proposals, such as minimising the EU's regulatory and bureaucratic barriers and clearing the way for a closer European financial union, are included in Draghi's report. Recognising the social implications of the proposed measures, the Letta report warns that,

the Single Market is a powerful engine for growth and prosperity, but it can also be a source of inequality and poverty if its benefits are not widely shared or, worse, if it leads to a race to the bottom in social standards.

(Letta, 2024: 91)

Although the Letta report does not explicitly analyse AI's role in fully implementing the single market, it highlights AI's general significance. The role of digital technologies is indirectly included in Letta's proposal to add a fifth freedom to the European single market, addressing the obligation to advance European research, innovation, and education. However, AI is not given a central role similar to the role it plays in Draghi's report. The Letta report's eight mentions of the significance of AI end by equating it with other, more limited applications of digital technology. For example, in the chapter "An Effective Single Market for Electronic Communications Networks and Services", AI is mentioned as follows: "technologies such as 5G (6G in the future), Internet of Things, web3.0, edge-cloud computing or AI will create entirely new economic opportunities" (Letta, 2024: 55). What is missing are references to AI from the viewpoint of European democratic values, contrary to Draghi's report (Draghi, 2024: 5), as well as to the EU AI Act, which promotes "the uptake of human-centric and trustworthy artificial intelligence (AI)" in accordance with Union values (European Union, 2023: Recital 1; compare with Letta's report where European values are mentioned, but only in a general sense; Letta, 2024: 23).

The Niinistö report and the focus on security challenges

Sauli Niinistö's report, *Safer Together: Strengthening Europe's Civilian and Military Preparedness and Readiness*, was published in October 2024, following the reports by Letta and Draghi. Niinistö's report focuses primarily on European security challenges. The report identifies three principal external vulnerabilities: the military threat against Europe created especially by Russia; European strategic dependence on external critical raw materials, creating a

gloeconomic risk; and global health hazards, as exemplified by the Covid-19 pandemic in 2020–2022. Again, as with the Letta report, the Niinistö report does not present a separate analysis of the importance of AI in Europe’s response to its security threats.

However, AI is mentioned in the report several times, with a more general characterisation: “disruptive and emerging technologies, such as AI, provide both new opportunities for building our security, as well as new vulnerabilities from the perspective of all hybrid domains” (Niinistö, 2024: 108). AI is presented here as mainly serving three roles: first, in combating disinformation and deepfakes, with an associated emphasis on promoting digital and media literacy (Niinistö, 2024: 74); second, in assisting the development of new drugs for preventing pandemics and other health crises; and third, in advancing the “dual use” of technology for both civilian and military purposes (Niinistö, 2024). Social media platforms are treated similarly: They are mainly credited with negative influence, and the EU’s mission should be to mitigate the platforms’ negative impact, as stipulated in the DSA and other documents (Niinistö, 2024: 74, 107). However, no concrete actions are proposed to improve the efficiency of the DSA, DMA, and EU AI Act.

The von der Leyen statement and the endorsement of AI in guiding EU strategy

Ursula von der Leyen’s statement to the European Parliament, *Europe’s Choice: Political Guidelines for the Next European Commission 2024–2029*, anticipated many of the recommendations included in the three reports. From the viewpoint of the EU’s forthcoming AI policy, von der Leyen’s guidelines included a promise by the Commission to provide, within the first 100 days, to the EU business community “access to [a] new, tailored supercomputing capacity for AI start-ups and industry through an AI factories initiative” (von der Leyen, 2024: 10). Further commitments include a pledge to “develop with Member States, industry and civil society an Apply AI Strategy to boost new industrial uses of AI and to improve the delivery of a variety of public services, such as healthcare” (von der Leyen, 2024: 10). Another initiative is the creation of a European AI Research Council, following the approach taken by the European Organisation for Nuclear Research. Most of the promises were diligently included in the European Commission communication, *A Competitiveness Compass for the EU*, in January 2025 (European Commission, 2025c).

Assessing the documents: Competitiveness, AI, and democracy

The connecting theme in the four documents examined is the imperative to improve Europe’s global competitiveness against the dominance of the US and

China while safeguarding democratic European values. This has been forcefully stressed by, among others, Mario Draghi (2024: 1) in the foreword to his report: “The only way to meet this challenge [of European competitiveness] is to grow and become more productive, preserving our values of equity and social inclusion. Moreover, the only way to become more productive is for Europe to radically change”. This raises a few questions. One, can these two goals be balanced in the first instance: to achieve growth levels comparable to the US and China while maintaining and further strengthening the European social model? As this is not the focus of this chapter, we concentrate on the second question in the reports discussed: What role is planned for digital technology and AI in achieving these goals?

Our *first* critical observation pertains to how the documents address the EU’s competitiveness. It is defined solely by contrasting Europe’s industrial productivity and economic growth with similar data on the US and China. The terms “competitiveness” and “productivity” are frequently encountered in policy discourse but remain notoriously difficult to define, let alone measure (Michalis, 2007: 192–198). The Draghi report indicates that Europe’s lacklustre performance can be attributed almost exclusively to the EU’s failure relative to the effective application of digital technologies (Draghi, 2024: 20), adopting essentially a techno-solutionist view, suggesting that (advanced) technology is the answer to complex economic and societal problems (Morozov, 2013).

In seeking solutions, Draghi’s report criticises the American model of industrial policy for its exclusive focus on corporate profits and its neglect of social responsibility. The report is also critical of the Chinese model because of its authoritarianism and centralised decision-making. This analysis resembles Bradford’s (2023), whereby the EU’s rights-based approach is compared to the US’s market-driven and China’s state-driven digital economy model (see also van Dijck et al., 2018). And yet, the advice the report offers to the EU appears, to a certain degree, to simulate the criticised American and Chinese models:

- One of the primary sources of growth in the US is public borrowing, which has led to a national debt equal to 123 per cent of its GDP. In comparison, the national debt for EU countries is 82 per cent of their GDP. The proposed increase in collective EU debt would mean adopting a similar approach to that of the US. However, there is concern that, as seen after the 2008–2009 financial crisis, potential new crises could result in EU member states being treated differently (consider the treatment of Greece, Portugal, and Ireland by the EU and financial organisations between 2009 and 2014; see, e.g., Filip et al., 2024).
- The relaxation of EU regulations on goods and services, aimed at boosting the success of innovative start-ups and fostering the emergence of European champions, could potentially harm the economies of

smaller EU member states and undermine European democratic and social values. As highlighted in the Draghi report, larger member states (France, Germany, and Italy) have greater resources to subsidise their companies, allowing them to grow and become European champions. Furthermore, relaxing the GDPR to benefit the European pharmaceutical and automotive industries, for example, could significantly weaken the European principle of privacy as a fundamental right.

- The projected reform of EU governance style and the proposed new industrial policy would significantly shift power from EU member states to the European Commission (Draghi, 2024: 67–69). Along with a more flexible regulatory approach, mentioned earlier, the Commission’s enhanced authority would devalue the influence of the European Parliament, the only directly elected EU institution, as a law-making body. Such a shift would further complicate the already fragile structures of democratic accountability within the EU (von Ondarza & Stürzer, 2024).

In his foreword, Draghi (2024: 1) discussed how the proposed measures align with marketing the EU as a beacon of democracy and freedom: “European fundamental values are prosperity, equity, freedom, peace and democracy in a sustainable environment. The EU exists to ensure that Europeans can always benefit from these fundamental rights”. Overall, Draghi’s report does not seem to justify the notion of presenting the EU as a global role model for good governance and social values, especially when compared to the practices of the US and China (the so-called “Brussels effect”; see Bradford, 2022). This leads to a comment and two questions. First, prosperity is not mentioned as a fundamental European value in EU documents. Second, if the primary goal of the EU should indeed be economic growth, why does historical evidence indicate that the benefits of growth and digitalisation have not been shared equally among all members of society? In fact, despite economic growth and AI, the inequality gap has continued to widen in both the US and China (see Riddell et al., 2024). Finally, and most importantly, as Applebaum (2025) has considered, if the EU relaxes its regulations and is no longer (perceived as) providing a rights-based framework for the digital society, who, in the global context, would be powerful enough to create and enforce laws governing tech companies and social media platforms?

Second, the Draghi report’s focus on exclusively comparing and contrasting the EU with the US and China suggests a world dominated by these three leading players. Such a perspective, however, overlooks most of the world’s population. The combined population of the EU, the US, and China is around 2.2 billion, while the global total is approximately 8.2 billion (Worldometers, n.d.). Issues such as competitiveness, productivity, and growth – which the reports address – are understood quite differently when analysed within a framework that includes the majority of humankind living in the countries of South-East Asia, Africa, and Latin America.

The narrow perspective of the Draghi report is evident in the way it approaches global sustainability. For instance, it presents the EU's decarbonisation goal primarily as a response to high energy costs caused by an external factor: The lack of European strategic gas and oil supplies from Russia following its invasion of Ukraine in 2022 (Draghi, 2024). Moreover, the report depicts European dependence on critical raw materials from the viewpoint of a potential threat from China, which could weaponise its supply to Europe as a tool for geoeconomic warfare. The EU's primary concern becomes finding and securing alternative sources of critical raw materials to meet its needs (see European Commission, 2024b). In all the reports, there is little discussion about the social and environmental costs associated with critical raw material extraction, an issue which has long been the focus of significant debate and political action in many countries (see Chagnon et al., 2022; Wang et al., 2024; Zapp et al., 2022), or indeed the far more complex geopolitical dependencies embedded in global supply chains that extend beyond raw materials to include the design and printing of components critical to the most sophisticated AI models, with ASML (Netherlands) and the Taiwan Semiconductor Manufacturing Company (TSMC) playing pivotal roles (Miller, 2022).

Our *third* observation relates to the internal dynamics of the EU and the relationships among its member countries. In several places, the report refers to the differences between the member states in terms of their economic and financial capabilities, as well as their geopolitical locations. Both factors significantly affect each state's ability and willingness to shape European policies on digital technologies.

First, the EU's history affords special roles to the six founding members (Germany, France, Italy, the Netherlands, Belgium, and Luxembourg) who, in 1951, established the European Coal and Steel Community, which is considered the origin of the EU. Following the laws of path dependency, these countries continue to host many of the EU's central institutions. Furthermore, five of them (France, Germany, Italy, Belgium, and the Netherlands) have long histories as colonial states, potentially providing them privileged access to trade with their former colonies, particularly those supplying strategic raw materials.

Second, there are massive disparities in the sizes of EU members' economies, which divide the members into different groups. Germany still maintains the world's third-largest economy, with an annual GDP of 4.7 trillion US dollars (following the US with 29.2 trillion and China with 18.3 trillion, and preceding Japan, which has 4.1 trillion; International Monetary Fund, 2023; World Economics 2024). In contrast, the annual GDP of the smallest EU members ranges from 0.6 trillion US dollars for Cyprus and 0.7 trillion for Estonia to 0.91 trillion US dollars for Latvia. With their economic might, Germany, France, and Italy wield more weight in EU negotiations compared to countries with GDPs five to eight times smaller. The Draghi report indirectly indicates this problem regarding member states' resources for supporting their

domestic industries: The larger the national economy, the more resources a country has to support its domestic champions.

On the other hand, the big EU members are also divided based on their economic compositions: Germany is strong in traditional industries, such as the automotive sector; France relies less on industry and is stronger in services; Italy is strong in agriculture, notably as the EU's leading exporter of vegetables. These economic differences are also evident in digital technology. France appears to lead European AI development with its Mistral-Large foundational model. Meanwhile, Germany's SAP Company has a strong foothold in global business software (SAP Global Communications, 2024). In contrast, Italy's AI development lags behind the EU average.

Third, a country's location might create specific interest in certain sectors of the digital technology industry. For instance, countries on the eastern border of the EU may be more interested in the military applications of AI compared with member countries located farther away from the border. This is evident in the military expenditures among EU members: Countries neighbouring Russia spend substantially more on defence than those located farther from Russia. Specifically, the EU members who share a border with Russia or its close ally Belarus (Poland, Estonia, Lithuania, Finland, and Latvia) report defence spending ranging from 2.3 to 3.8 per cent of their GDP. In contrast, countries farther to the west allocate a much lower percentage of their GDP to defence, such as Italy (1.6%), Spain (1.5%), and Ireland (0.22%).

This uneven sharing of the military burden creates tensions within the EU. Furthermore, since most EU members are also members of NATO, some confusion exists regarding the sharing of the two organisations' obligations and allegiances. For example, following its departure from the EU, the UK has maintained close military cooperation with several EU members through defence alliances. One such alliance is the UK-led Joint Expeditionary Force, which includes the UK, Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, the Netherlands, Norway, and Sweden (see Knighton, 2024). The coordination of this effort with the EU's Common Security and Defence Policy is unclear (see Ojanen, 2006). However, because the EU is not primarily a defence union, Central and Eastern European countries may be more interested in developing AI technologies within NATO collaborations rather than within the EU framework.

Our fourth observation pertains to the rather naïve understanding of AI reflected in all the documents. These texts treat AI as a single entity without recognising its nuances or qualifications. For instance, they lack classifications of the multiple developmental forms of AI, such as distinctions between narrow or traditional AI, which has already been deployed in everyday digital applications for some time, like chatbots, and search and recommendation engines. Also missing is an in-depth discussion of generative AI (GenAI) based on foundational large language models, like ChatGPT, Gemini, and Llama. In the Draghi report, the term "generative AI" appears twice, similar to the term "foundational" AI, but neither term is explained.

Also missing is a critical review of the present state of AI development and the targets the EU should set for AI's further advancement, based on its values and the European social model. This creates two problems:

1) As a technology, AI can provide trustworthy results only when based on relevant and reliable data. All major foundational AI models used in Europe are commercially produced and maintained by US-based companies. However, their algorithms are not optimised to align with European or social values, which require that AI services in Europe must always undergo critical scrutiny, as stipulated in the EU legislation. This problem is evidenced by the numerous violations that American platform companies have committed against the EU data regulations, including the GDPR, DSA, and EU AI Act (on AI biases, see Ferrara, 2023; Varsha, 2023; on the platforms' breaches of EU regulations, see Hill & Sharma, 2025).

2) From the perspective of AI digital infrastructure, Europe is critically dependent on American technology, as evidenced in the report. An analysis comparing European and American competence in AI revealed that American companies strategically dominate the AI value chain:

- All major GenAI models have been developed outside Europe, with the most successful ones being operated by American companies (OpenAI, Microsoft, Alphabet, Anthropic, and Meta). The only successful European GenAI, France's Mistral AI, is significantly smaller. For example, Microsoft's market valuation is 3.325 trillion US dollars, and OpenAI's valuation is 157 billion US dollars, compared to Mistral AI's valuation of 6.2 billion US dollars (Companies Market Cap, 2025; Hu & Cai, 2024; New York Times, 2024).
- The most advanced microchips necessary for GenAI are produced and controlled by American companies, with Nvidia holding a practical monopoly on the trade of the most popular chips. Although the company is US-owned, its chip factories are located in Asia, particularly Taiwan, which produces about 90 per cent of the world's most advanced semiconductors. The irony is that the machinery TSMC (Taiwan) needs to make the chips is manufactured by ASML, a European company based in the Netherlands (see Forbes, 2022 ; Kassam, 2024).
- As stated in the Draghi report, the data clouds at the core of GenAI are overwhelmingly owned by American companies (65% by the three leading cloud providers). In contrast, Europe's largest cloud operator captures only 2 per cent of the European cloud market (Draghi, 2024: 24). This means that a significant portion of critical European data – not only economic and financial but also diplomatic, private, and military – is stored in cloud services that are not subject to European democratic oversight. These risks are compounded by the proliferation of new and planned data centres worldwide, whose substantial energy and water demands for cooling are often decided upon without adequate consultation with local communities or consideration of environmental impacts (Zewe, 2025; Marrinan, 2025).

- The report overlooks the backbone of the digital economy – the physical Internet network formed by underwater cables that connect continents and countries. More than 95 per cent of all international communications travel through these cables. Given their strategic importance and physical vulnerability, highlighted by several recent incidents of cables being cut in the Baltic Sea, control and ownership of the cables have become important issues (European Commission, 2024a; Runde et al., 2024).

Conclusion

We started this chapter with two questions: What solutions are presented in the documents reviewed for overcoming Europe’s economic backwardness and lack of competitiveness? What role is assigned to AI and the so-called European values in these solutions?

The principal tenor of all four analysed documents is the concern regarding Europe’s economic decline compared to the US and China, alongside increasing security threats that combine military and economic vulnerabilities. Across the documents, a common conclusion highlights the primacy of speeding up Europe’s economic performance and accelerating growth if the EU is to compete effectively with the US and China, while simultaneously reinforcing its security. Although all the documents stress the significance of safeguarding the European model – described in terms of social inclusion, democracy, and human rights – the exclusive focus on European competitiveness and economic productivity relegates European values to a secondary position. This appears to contradict the precise order of priorities outlined in the EU AI Act, according to which the Act,

should be applied following the values of the Union enshrined as in the Charter, facilitating the protection of natural persons, undertakings, democracy, the rule of law and environmental protection, while boosting innovation and employment and making the Union a leader in the uptake of trustworthy AI. (European Union, 2023: para. 2)

The primary obligation is to support human well-being, which is served by boosting innovation and employment (see European Union, 2023: para. 6).

The contradiction between the documents analysed in this chapter and the value-based principles of the EU AI Act is evident in practice by the lack of serious assessment of the social implications and the impact on European values of the proposed solutions. Moreover, many of the remedies suggested for the European economic malaise appear to follow the models provided by the two competitors, the US and China:

- the Draghi report proposes that the EU embarks on massive collective public borrowing similar to the approach taken in the US to promote economic recovery and foster innovation through public debt. However,

this plan increases the fears of smaller EU members about a growing dependency on the three largest countries (Germany, France, and Italy);

- Draghi's and Letta's proposal to reduce EU regulations to pave the way for the fully functional single market risks weakening the democratic and social rights of EU citizens, which most regulations were originally established to protect;
- the proposals for the European Green Deal and the EU's Global Gateway strategy (see European Commission, 2021c) do not adequately address the harm that the extraction of strategic materials, including critical raw materials, can have on nature and society in the countries where most of these materials are sourced;
- the calls for a substantial increase in defence budgets across EU countries and the emphasis on developing AI programmes for dual-use (civilian and military) digital technology indicate the further securitisation and militarisation of Europe, compromising the social and democratic needs of society; and
- the proposed reform of EU governance, which involves renouncing the "Community Method", would concentrate executive power within the European Commission at the expense of individual EU countries and result in an increasing imbalance of power within the EU's structures.

Assessing the role of AI in proposed solutions for improving the EU's productivity and competitiveness, we concluded that AI and digital technology, in the broader sense, are approached from a relatively narrow perspective, which does not fully capture the potential and significance of AI. The reports consider AI's role only from an economic standpoint, emphasising its capacity to promote productivity and growth. While European values, social inclusion and democracy are mentioned, the potential to deploy AI to promote these values and alleviate the growing social concerns in Europe – such as poverty, inequality, immigration, protection of minorities, and prevention of child sexual abuse material – is not discussed.

In the political guidelines for the next European Commission, Ursula von der Leyen (2024: 10) claimed that "Europe is already leading the way on making AI safer and more trustworthy, and on tackling the risks stemming from its misuse". She committed, among other things, to develop an Apply AI Strategy and establish a European AI Research Council and European Data Union Strategy in collaboration with member states' industry and civil society. However, the relationship between these and other guidelines on AI to some other important pledges, such as "putting citizens at the heart of our democracy" and the "need to embed citizens' participation across the EU" (von der Leyen, 2024: 24), remains unclear, as there is no mention of how the pledged actions will be implemented.

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