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**Player or Board Game? In Search of
Europe's Strategic Autonomy: The Need
of a Common Digital Strategy of the
European Union Towards the People's
Republic of China**

Loreto Machés Blázquez



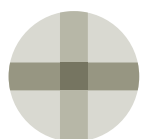
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Player or Board Game? In Search of Europe's Strategic Autonomy: The Need of a Common Digital Strategy of the European Union Towards the People's Republic of China

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“As we stand at the start of a new decade, and look ahead to that digital future, the one thing we can say for sure is that none of us –not even the greatest experts– knows exactly how technology is about to change our lives. That’s partly because the digital world is so innovative – and innovation is uncertain by its very nature. But it’s also because the digital future will be powerfully shaped by our own choices and actions.”

“Because we have what it takes to succeed in the digital world”.

“But it’s not enough just to say that we want Europe to lead. We need to know where we think it should be leading. And that has to start with the values and principles, with the democratic spirit that make Europe what it is. So we can build a digital future that’s every bit as fit for Europeans as we are for it.”

Margrethe Vestager, 2020, p. 1.

Image 1. Margrethe Vestager, Executive Vice-President of the European Commission in charge of Europe fit for the Digital Age, and Commissioner for Competition (left), and President of the European Commission, Ursula von der Leyen (right)



Source: European Commission

“Without any doubt, there is a clear need for Europe to take clear positions and quick actions on global affairs.”

“The relationship between the European Union and China is simultaneously one of the most strategically important and one of the most challenging we have.”

“From the outset I have said China is a negotiating partner, an economic competitor and a systemic rival.”

Ursula von der Leyen, 2020, p. 15.

Index of Acronyms

AI	Artificial Intelligence
BRI	Belt and Road Initiative
CAI	Comprehensive Agreement on Investment
DSR	Digital Silk Road
EU	European Union
EUGS	European Union Global Strategy
HR	High Representative of the Union for Foreign Affairs and Security Policy
HR/VP	High Representative of the Union for Foreign Affairs and Security Policy and Vice President of the European Commission
NATO	North Atlantic Treaty Organization
OBOR	One Belt One Road
PRC	People's Republic of China
TEU	Treaty on the European Union
TFEU	Treaty on the Functioning of the European Union
US	United States of America
VP	Vice President of the European Commission

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“The times in which we can fully count on others are somewhat over, as I have experienced in the past few days, [...] we Europeans must really take our destiny into our own hands.”

Angela Merkel, 2017

Chapter I: Introduction and Contextualization

The European Union (EU) is a unique economic and political organisation due to its founding essence. The great majority of international organisations are based solely on the principle of cooperation, allowing its members to discuss, agree and commit on specific matters and objectives, nonetheless, participant States continue to have their own single voice and retain their overall decision power. The European Union goes a step beyond and not only uses cooperation in its structure but introduces a much deeper guiding principle, namely integration.

The remarkable nature of the Union lays in the notion that sovereign States have given through the signature and ratification of the European Treaties certain powers, aims and objectives to the Institutions of the Union. This means that States have forwarded their sovereignty to the EU in order to govern in specific sectors, mostly economic and monetary, either on an exclusive, shared or cooperative basis. The result is the creation of a Union that comprises a vast part of the European continent with 27 Member States, shelters over 400 million citizens, and represents a major economic power and political actor in the international sphere.

Notwithstanding, the European Union is not a closed project, as it continues to develop and adapt to internal and external challenges. The origin of today's Union dates back until after the Second World War with the vision of French Politician, Jean Monnet, one of the founding fathers, to unify the Franco-German productions of coal and steel under the coordination of a common supranational High Authority. This first initiative, which was presented during the Schuman Declaration in 1950, described the latent desire of preventing another possible war or armed confrontation between European States. As a result, the European Coal and Steel Community was founded in 1952, initiating a process of integration that allowed for the foundation of the subsequent European Communities and nowadays the unified body with judicial personality of the European Union.

History shows that the Union was not built from one day to the other, it took time. As stated by Robert Schuman (1950, p.1) “Europe will not be made all at once, or according to a single plan. It will be built through concrete achievements which first create a de facto solidarity.” The EU was firstly conceived as an economic project, which has evolved over the years to include the political and social dimensions, once the needed solidarity, willingness, ambition, and purpose were present. It is without a doubt that, because of this, the Union has moved slowly and even had to take a step backwards at certain moments before stabilizing. Nonetheless, the European project has always moved on and continues to be built.

In this sense, the European Union has deepened its Agenda in a wide range of issues including the protection of the environment, external relations, military, and defence or the promotion of its values. This is a response caused by the commitment of Member States to pursue a stronger European position, as in today's world no European country can face domestic and foreign challenges alone. Moreover, this idea is the guiding principle defended by former High Representative of the Union for Foreign Affairs and Security Policy (HR/VP), Federica Mogherini, in the EU Global Strategy, which receives the title of: *Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign And Security Policy*. In other words, more Europe is needed, and it is needed now.

When thinking about the future, one element that notoriously stands out are the new technological and digital mechanisms. These factors are present in both the private and professional realm and will design the future of economies and ultimately the power and influence of States. It is therefore not surprising that the People's Republic of China has invested a considerable amount of its GDP in financing digital research, development, and innovation. Moreover, it has developed highly ambitious internal and external strategies

of digitalisation, making a strong approach towards the European Union and its Member States, actions that have set off the alarms in the United States.

If the EU wants to pursue its strategic autonomy and persist in today's international sphere, as Chancellor Merkel (2017) highlighted during a G-7 summit, it is time for the EU to take its own destiny into its own hands. The Union needs to have a united front and develop a community strategy towards China's digital advancement. Furthermore, it has to decide whether it wants to continue being solely the game board for other digital powers' confrontations or evolve as a referee or as an important player.

1. Study Research

In June 2016 former HR/VP, Federica Mogherini, presented the European Global Strategy (EUGS) which replaced the European Security Strategy of 2003. The new doctrine addresses the security and defence approach of the Union and its Member States in order to protect its civilians, engage in cooperation with third countries and organisations and positively respond to threats. Moreover, it puts the main focus in achieving the strategic autonomy of the EU, which becomes a guiding objective in the development of future actions. This Strategy comes as a much-needed response towards a series of external challenges and events such as the economic crisis of 2008, the refugee crisis, social integration concerns, terrorist attacks or the surge of armed conflicts in certain regions of the world, that have shaken the Union's security and stability. In addition, the document is presented shortly after the result of the Brexit referendum, notifying the departure of Great Britain from the EU in the following years. Therefore, it becomes clear that the Union has to rethink its own Agenda and start acting consciously in order to promote a common direction.

Besides the difficulties and obstacles, these episodes have triggered community initiatives and doctrines in numerous affairs as to pursue a more united and stronger Europe. This is clearly visible in the six objectives set out by the current European Commission for 2019-2024, which address issues that are vital to guarantee the proper progress of the Union and consolidate it as a major power with strategic autonomy. One of the priorities is "*a Europe fit for the digital age*", focused on delivering a digital strategy in order to adapt European countries for a new generation of technologies. This is a very significant approach for one simple reason, the future will go hand in hand with digitalisation. Even though it cannot be precisely predicted how fast technology will evolve or the scope of influence it might reach, the reality shows that the defence and security, economic, social, and political spheres cannot be conceived without digital or technological tools. It is therefore unquestionable that the Union has to take action in this realm and strengthen its position towards the outside world. More precisely in its own digital strategy towards China, which, as a major economic power and its ongoing rivalry with the United States, will have a considerable influence in the future evolution of global affairs. Taking this into consideration, it is of significant interest for the Union to have a united and precise approach towards a country that is already in the playing field seeking its position. The EU has to decide whether it just wants to remain silent or participate.

2. Purpose and Motives

The purpose of this Final Thesis is to analyse the European Union's digital strategy concerning today's most important rising technological giant, the People's Republic of China (PRC). This country has developed over the last years a number of initiatives regarding digitalisation such as the New Digital Silk Road (DSR) or Made in China 2025, which have and will have a world-wide impact, including the EU and its Member States. Furthermore, it also generates an open confrontation with the United States as the main rival, dividing the countries, including Europeans, between two technological powers and their disputes in the search of a hegemonic position. In this sense, the European Union needs to review its own digital strategy in relation to China, which already knows the advantages of dividing the Union and addressing Member States individually in an attempt to reach agreements faster and easier than dealing with a united EU. It is visible that the PRC has a clear mind of what it wants and what it wants to pursue, the EU might however still have to transform its words into action or strong strategies.

The aim is to provide, an analysis of four possible scenarios –*board game, referee, player* and *hybrid*– that will depend on the type of strategy the Union might choose, highlighting what the possible combinations are between them and what strengths and opportunities each of them offer. This will be based on the previous analysis of eight internal and external drivers chosen from the contextualization and state of the art sections and which play an important role in building the EU's approach towards China.

In regard to the selection of this specific topic for the Master's Thesis, a total of three motives have driven the author to carry out an analysis of the Union's digital strategy and the future possible scenario with respect to China.

First of all, as an International Relations (IR) and Translation and Interpretation graduate, the author has been studying the evolution of game power between countries, the different relationship and alliances that have been forged or the important events of global affairs since the very start of her academic path. In this sense, one country that has been present in many lectures due to its influence, growing power and influence of future world impact is the People's Republic of China. The Asian country has emerged as a main actor in the international sphere. Beyond occupying one of the permanent seats at the United Nations Security Council that allows Beijing to control the international intervention in specific security related issues, China has evolved to become the second economy in the world and invest heavily in foreign investment. Most precisely, its focus during the last years in developing digital and technological strategies that go hand in hand with state-owned enterprises makes it a much more interesting and relevant subject to analyse.

Secondly, by orientating her International Relations Studies in the realm of Security and Foreign Affairs and wider deepening her knowledge through the enrolment in a Master's Degree of the European Union, the author has mainly focused on topics concerning foreign relations and security aspects of the Union. The current crisis originated by the COVID-19 pandemic has highlighted more than ever that digital technology is a vital element for the present and an indispensable mechanism for the future. States need to develop an approach in digitalisation if they want to effectively responds against threats, challenges and enjoy also possible opportunities. In this sense, the European Union has already recognized the importance of this topic by introducing the Commission's objective *a Europe fit for the digital age*. However, a much more united digital strategy needs to be adopted towards China if the Union wants to continue its search for strategic autonomy and become an actor with a strong voice in the international sphere rather than the game board for the other powers' rivalry.

Lastly, the author knows the relevance of performing research analysis of matters that have a direct impact on the targeted study. In this case, the European Union, and how the possible evolution of events might affect the strength, evolving, and even survival of the chosen target. Therefore, reviewing the Union's digital strategy and its approach towards China, one of the main digital and technological giants (Cheong, 2020), is of strict importance. Not only because it concerns security issues of the EU but because it addresses the evolution and future prospects of the Union, with each future scenario having different results in either weakening or strengthening its position as an international actor.

Chapter II: Objectives & Structure of the Analysis

3. Research Questions

Taking into consideration the above presented information regarding the revision of the European Union's approach towards China's technological expansion a series of issues of concern and subsequent questions come to the surface.

- Why does the EU need to achieve strategic autonomy?
- Why is it necessary for the EU to develop a common digital and technological strategy towards China?
- Will the EU become a *player*, a *referee* or the *game board* of the digital race between leading superpowers?
- What are the risks and benefits of the four future scenarios?

4. Hypothesis

The hypothesis of this study is based on the perception that if the European Union wants to keep its relevant status and become a major actor in the international scene, the fundamental prerequisite is to pursue the strategic autonomy of the Union. In order to achieve this, the EU has to take common positions on various matters, being one of the most important the technological and digital fields, which are primal for State's prosperous economic and social futures.

In this regard, the rivalry between the United States and China, the increase of China's investment in research, development and innovation, China's digital advancement in Africa, Europe, and Latin America, and lastly, the consequences of the COVID-19 crisis, open up a window of opportunity to put on the table of the European Institutions a debate on the need to develop a common digital and technological strategy towards China.

For the moment, the European Union is described as a normative actor that has developed a regulatory base, nonetheless, it needs to become a more active player. Moreover, in the digital domain the Union seems to be the game board for the US-China rivalry, not having a single strong voice that allows it to pursue its own visions and interests. It is about time to boost the common European position and strengthen the EU as a regulatory referee, but, at the same time, strive to become a single player in the future if it truly wants to achieve strategic autonomy.

5. Time Framework

The point of departure of the study will be the European Union Global Strategy of June 2016, document in which the pursuing of strategic autonomy is firstly envisioned as a guiding principle of the Union's action, and will comprise the period until March 2021, time in which the final version of the EU-China Comprehensive Agreement on Investment (CAI) was presented.

6. Geographical Framework

The focus of the study and its analysis will centre around the European Union's security strategy towards China, guiding therefore both actors the geographical spectrum of the Thesis. As a contextualization, the influence of the United States will be addressed as well but only as a means of clarification.

7. Conceptual Framework

In order to develop and provide a future scenario foresight of the European Union's digital strategy towards China, the conceptual framework of the qualitative analysis of this Final Thesis is based on Richards Heuer

and Randolph Pherson's (2015) *Simple Scenario Method*. This technique is based on the following steps (see Annex 1):

- Identify the subject matter and the specific objectives.
- Elaborate a list of strengths, factors and events that might have an impact of influencing in the future.
- Allocate those elements in common groups of five or ten, which will be the driving forces that determine the evolution of the main subject matter.
- Identify those forces and nametag the final composition of drivers. Each of them will have three possible impacts on the different scenarios: positive or negative, strong or weak, and neutral.
- Formulate three-four scenarios based on the previous drivers for: neutral, general, best, and worst case.
- Describe the scenarios and compose a list of implications for the targeted client.

In addition to this procedure, Fulton Armstrong's (2020) handouts for analysis building (see Annex 5) will be used as a continuation of the previous mentioned steps. The first template is used for describing the identified drivers and its trends, while the second template is used for portraying the scenarios, the possible wildcards or unpredictable factors, and the implications.

8. Methodology

This paper will provide a study of the possible development of a common European digital strategy towards the People's Republic of China based on three future scenarios, while seeking to answer why a strategy is important, why a window of opportunity is present to push a common position, and what the possible consequences are depending on the decisions taken.

Building upon the previous mentioned conceptual framework, the analysis chapter will be divided in two main sections, one for drivers and one for scenarios. This structure provides for a step-by-step methodology that will guide the study of the foresight analysis.

First of all, the driver's category derives from the retrieved information in the contextualization and state of the art chapters. These drivers are selected using the list of steps outlined by Richards J. Heuer and Randolph H. Pherson (2015) for their *Simple Scenario Method* in their book *Structured Analytic Techniques for Intelligence Analysis*. With the subject matter of this Thesis already established, the author identifies a series of factors, strengths and events that have an influence on the chosen subject using therefore the information collected for investigation. After annotating these forces, they are divided in eight different main groups, which are then allocated in two subparts, internal and external drivers, depending on whether their influence comes from within the European Union or from the outside world (see Annex 2). For a simplified overview of the work, Fulton Armstrong's (2020) handout Model H (see Annex 5) will be used to summarise the retrieved information in the end.

Secondly, once the drivers have been analysed, the scenario building category will transport the previous study into developing four principal future scenarios: *board game*, *referee*, *player*, and *hybrid* (see Annex 3). These are built upon the three possible impacts that drivers can have -positive or negative, strong or weak, and neutral- on each of the scenarios. These scenarios will be studied individually, including the respective advantages and difficulties they present. Following, a comparative analysis of the implications of the four will be carried out, offering possible considerations and predictions. In addition, for a shorter overview of this section, Fulton Armstrong's (2020) handout Model K (see Annex 5) will be used to simplify the discovering.

Finally, the conclusions will offer an insight on the main findings reached throughout the study research.

9. Contextualization of the Analysis

For the purpose of carrying out a straightforward future scenario analysis, a number of events, relations and concepts need to be clarified. The information collected in this section will guide the election of drivers for the analysis chapter.

9.1. International Order: US-China Rivalry to Become the World's Leading Power

The relationship between the United States and China is known for being complex and multifaceted in which, during its development, a continuous and tireless career for achieving the first position of dominance has taken place.

As Frías Sánchez (2019) highlights, over the past 40 years, after the death of Mao Tse-Tung in 1976 and Deng Xiaoping's accession to power in 1978, the economy of the People's Republic of China has gradually transformed from being primarily agricultural to a heavily industrial and export-oriented economy. Moreover, in recent years, this low-profile export-driven foreign policy has become expansive and focused on controlling the logistical infrastructure needed to secure its regional and global trade (de Carlos Izquierdo, 2019).

According to de Carlos Izquierdo (2019), the PRC's foreign policy started to change drastically in 2012, year in which Xi Jinping took over the position of General Secretary of the Central Committee of the Communist Party of China and one year later of the Presidency, with the purpose of making the country the centre of Asia and the centre of the world. As Callahan (2016) outlines, Xi Jinping's vision of the "China Dream" policy is to rejuvenate the Chinese nation and people's happiness by achieving a rich and powerful country through a two-century approach project. For the first, the goal is to "complete the building of a moderately prosperous society" by 2021, and for the second for China to become "a modern socialist country that is prosperous, strong, democratic, civilized and harmonious" by 2049 (Callahan, 2016, p.3).

The materialization of this general vision started in 2013 with the presentation of the Belt and Road Initiative (BRI), the biggest infrastructure undertaking also known as the One Belt one Road Initiative, with "belt" referring to the overland routes and "road" to the sea routes that create logistic hubs all over the world (de Carlos Izquierdo, 2019). This was followed in 2015 with the announcement of the Digital Silk Road (DSR) for foreign digital, technological and communication initiatives, and the Made in China 2025 national strategic plan for the evolution and modernisation of global manufacturing. Furthermore, in 2018 a new project, China Standards 2035, started to be managed by the China Academy of Engineering (de La Bruyère and Picarsic, 2020). In words of Kharpal (2020a, p.1) "it is a an ambitious 15-year blueprint that will lay out Beijing's plans to set the global standards for the next-generation of technologies," although the final document has not yet been published since officially announcing it in 2020.

China's ambitions have not become unnoticed to the United States, which has taken a strong approach in its relations towards the country. As outlined by de Carlos (2019) and Frías Sánchez (2019) many analysts and scholars consider that the Asian giant will soon become the first economic superpower and overtake the US, a statement that is also fared by Washington D.C. With the entering into Office of former American President, Donald Trump, in 2017, and his *America First* policy, a new confrontation emerged between both countries. Not only their ideological differences but also the economic disparities and the Asian country's desire to expand and consolidate its power were at the forefront of hostilities, which had a direct effect in the economic, digital, and geopolitical spheres.

Concerning the digital and technological arena, the US has banned its companies since 2012 from using Huawei network equipment for fear of it being used to spy on other countries and businesses. Moreover, "the company was added to the US Department of Commerce's Bureau of Industry and Security Entity List in May 2019, following an executive order from" former President Trump that was extended until 2021 and it is still unclear what position President Biden will take (Keane, 2021, p.1). In addition, in 2019 Trump announced an increase in tariffs on Chinese goods imported to the US, in place since 2018, as a response for the alleged deployment by Beijing of predatory tactics to try to give Chinese companies an advantage in new technologies as artificial intelligence (AI), robotics and electric vehicles (Asfour, 2019).

Although it has yet to be seen how the US's foreign policy towards China will evolve under the new Biden Presidency, the reality is that even if diplomatic relations might smoothen from now on, the rivalry between both powers will persist and espionage allegations will continue, conditioning in this regard the international relations of the rest of the world. There is no doubt that China has a clear vision of what it wants, as it can be seen from its strategies, the US however still has to find a more precise approach towards the Asian country if it wants to hinder its expansion but also not engage in confrontation.

9.2. EU-China Relations

The official ties between the European Union and China started in 1975 with the mutual diplomatic recognition (EEAS, 2019). The willingness of both actors to seek cooperation and engage in their respective commitments, allowed for the forging of bilateral relations that soon spilled over from the economic field to include also the political, cultural, education, climate change, foreign relations, security, and further dimensions. Nonetheless, despite the mutual interest in establishing a good alliance, the relation has not always been straight forward, suffering turbulent times at certain periods due to ideological differences, human rights discrepancies, or economic disloyalties among others. According to author Georgina Higuera (2020) the relation between Brussels and Beijing can be described in five bilateral cycles: 1975-1984, 1985-1994, 1995-2003, 2004-2013, and 2014-until now.

The first period of 1975-1984 represents the initiation of ties when European Commissioner for External Relations, Christopher Soames, visited Beijing with the purpose of promoting industrial and manufacturing exports towards the PRC, leading to the mutual diplomatic recognition by both actors. Various years later, in 1978, the European Economic Community (EEC) and China sign their first commercial agreement, with the countries committing to grant the other the most-favoured-nation treatment in all matters relating to customs duties and taxes. Nonetheless, even if ties continued to flourish, a European policy towards the PRC was still lacking at the time (Higuera, 2020).

The second period of 1985-1994 consolidated the relationship with the signing of a new Agreement on Trade and Economic Cooperation in 1985 that initiated several projects in rural cooperation, education, and equipment modernization. Moreover, a delegation of the European Commission was installed in Beijing in 1988 that opened new mechanisms of communication. This cycle strengthened the bond and equipped it with the necessary tools to advance in new fields of interest. However, following the Tiananmen Square protest of 1989, the relation suffered a stop, as a part of the international sanctions against the Chinese Government. The European Council decided in 1990 to start lifting sanctions to re-establish the trade and cooperation relations, which were fully restored in 1992, with the exception of the arms and high technology embargo. Realizing the need of an approach towards the PRC, the European Commission proposes a Strategy towards Asia, the first document that prioritizes the region and outlines the objective of strengthening the economic presence in Asia (Higuera, 2020).

The third period of 1995-2003 marks what is described by scholars Chen, Dai, Pan and Ding (2013) as the honeymoon phase, enhancing thus the strategic partnership of both actors. The European Commission proposes in a communication of 1995 a long-term policy for China-Europe relations (Resolution A4-0198/97), highlighting the importance of having a cooperative rather than confrontative relationship and the need of further developing mutual economic interest. Brussels continues its approach towards the Asian country, which starts to show its economic potential. At this point, the honeymoon period comes to the surface with the Commission launching in 1998 the Communication, "Building a Comprehensive Partnership with China" (COM, 2000/552) with the purpose of upgrading relations through the introduction of five main objectives: 1) engaging China further in the international community by upgrading the political dialogue, 2) supporting China's transition to an open society based on the rule of law and the respect for human rights, 3) integrating China further into the world economy, 4) making Europe's funding go further, and lastly, 5) raising the profile of the EU in China. Moreover, the first EU-China Summit took place that same year, which was followed by an increase in cooperation and documents as the "EU strategy towards China: implementation of the 1998 Communication and future steps for a more effective EU policy" of 2001 and Beijing's first policy towards

the EU in “China’s 2003 policy paper” outlining equality, mutual respect, and commitment to promote world stability (Higuera, 2020).

In words of Higuera (2020), during the fourth stage of 2004-2013 a political disenchantment takes place after the previous years of progress. Disputes arise between both actors concerning human rights protection, Beijing’s fewer willingness to assume compromises, intellectual property disputes, openness of markets, and China’s growing presence in Africa. Nonetheless, despite political tensions, the bilateral commerce continued to grow. In 2006, a Memorandum of Understanding (MoU) “on regional policy cooperation was signed with the Chinese National Development and Reform Commission to exchange information and best practices on experiences in setting up and implementing cohesion policy” was signed, with another MoU regarding technological cooperation (COM, 2020a, p.1). Furthermore, in 2013 the EU-China 2020 Strategic Agenda for Cooperation (2013) is signed, addressing peace and security, prosperity, sustainable development, and people-to-people exchanges.

The last period expands from 2014 until now, but the evolution of political actions still has to determine whether it will be known for partnership or rivalry. When Xi Jinping takes over the Presidency of the PRC in March 2014, the possibility of renewing relations is given, with the President demanding a more transparent, fair, and trusted partnership. Moreover, during the same year the country issues its second document regarding its relations with Brussels, highlighting the actors’ understandings over differences. Nonetheless, the European mistrust towards the PRC started to emerge due to its rising power and technological potential that no longer could be seen as a developing country. In this sense, accusations of bad practices in the market regarding high technology started to flourish, which culminated under Trump’s presidency with a commercial confrontation towards the Asian giant (Higuera, 2020).

China’s new Belt and Road Initiative and its digital dimension, Made in China 2025, and now China Standards 2035 have further contributed to the Union’s concern. This has led to the EU’s demand in the Joint Communication of “EU-China – A strategic outlook” (JOIN, 2019, p.1), for a “greater reciprocity, non-discrimination, and openness of” China’s system, including the maintenance of the rules-based international order. More importantly, it hardens its discourse by describing the PRC as “an economic competitor in the pursuit of technological leadership, and a systemic rival promoting alternative models of governance” (JOIN, 2019, p.1). The Communication also outlines the 2016 Strategy on China (JOIN, 2016), as the core guiding document for the Union’s engagement, promoting reciprocity in a series of digital, social, economic, and sustainable goals. One of the latest achievements has been the agreement in principle of the EU-China Comprehensive Agreement on Investment (CAI) in January 2021, for both facilitating and developing trade and investment between the parties. Although signature and ratification are still needed for its implementation.

As Higuera (2020) points out, the future of EU-China relations lays on the notion of learning how to dialogue under new circumstances and compromising to build trust. The PRC has a very clear vision of what it wants in the European Union, therefore it is time for the Union, to define a clear Community policy towards China. In this respect, the scholar points out how political scientist note that it is fundamental for Member States to adopt as their own the guidelines of the EU Global Strategy 2016. In this regard, pursuing strategic autonomy is not only necessary in security and defence, but also in technology and digital independence.

9.3. The Future of the EU: Developing Strategic Autonomy

The European Union has evolved over the years to become a major economic and political actor in the international sphere. It shelters an estimated population close to 450,000,000 citizens, which constitutes approximately a 5,8% of the world population in the year 2020 (VID & IIASA, 2020). Moreover, as one of the most important trading blocks and economic partners, in 2019 it reached a nominal gross domestic product (GDP) of around 15.6 trillion US dollars (IME, 2021) with Member States such as Germany, France or Italy occupying the fourth, seventh and eighth position respectively of the world’s highest nominal GDP (Silver, 2020). In addition, as part of its growing influence, the EU is also a member of the G20 and a non-enumerated member of the G7, moreover, it represents itself in various international and regional organizations including the United Nations.

Nonetheless, despite having reached a position of relevance and importance, it has become clear that in order to maintain and continue building a stronger Europe, the Union has to thrive a common position in a number of matters. Without a united voice and a common position, the EU cannot grow, and it cannot fully consolidate itself as a world power. Furthermore, once a community approach has been reached, then it will be possible to achieve the now much desired strategic autonomy. This concept is not new in European politics, it has been already addressed by European politicians for a period of time, but most importantly, its meaning has evolved over security matters and modernized to include a broader vision.

The first significant address towards strategic autonomy started when former HR/VP, Federica Mogherini, introduced it as a major objective of the EU Global Strategy of 2016, with the purpose of guiding the Union's external policies and actions. At that time, the concept was still used with a more military and defence connotation, being it employed by the Council in 2013 regarding the defence industry and the capacity to strengthen the EU's ability in this sector by developing the Common Security and Defence Policy (CSDP) (Borrell, 2020). The following addresses at community level started to grow over the CSDP field, although the idea continued around the previous mentioned lines, a trend that has been followed by many scholars. According to Sven Biscop (2018, p.171), this term stands for "the capacity to undertake certain military tasks at all times and therefore, if necessary, alone", while Lippert, Ondarza and Perthes describe it as "the ability to set one's own priorities and make one's own decisions in matters of foreign policy and security, together with the institutional, political and material wherewithal to carry these through –in cooperation with third parties, or if need be alone" (2019, p.5).

Notwithstanding, it appears that the Union's standpoint has evolved, being the current High Representative, Josep Borrell, responsible for clarifying the meaning of this concept today and highlighting its growing importance. Borrell (2020) outlines that the term has its origin indeed in the defence industry and therefore has been mostly used in this domain. However, even if the security dimension still dominates, today the term has expanded to include further issues and subjects of economic and technological nature that are indispensable for State's survival. This has been clearly visible through the implications of the COVID-19 crisis, which have shown that digital, environmental and health issues, among others, are indispensables for guaranteeing a country's strength and autonomy towards other international actors.

According to Borrell (2020), the importance of strategic autonomy relies on the fact that the European Union cannot describe itself as a political union capable of acting as a global player or as a geopolitical Commission without being even autonomous. The High Representative sentences that the weight of the Union is shrinking in the world and that it will fall far behind China and the United States, including India, in terms of Gross National Product (GNP) in the following decades. Secondly, regarding economic interdependence, Borrell (2020) states that the EU has already invested in this matter, especially with securing multilateralism. However, COVID-19 has shown the asymmetrical nature of interdependence of the Union in terms of science, technology, trade or data, that are indispensable in assuring the defence of European values.

These latest events have shown that strategic autonomy goes beyond its original meaning. As scholars Leonard and Shapiro (2020) recount, the EU is facing a total of five agendas –health, economic, digital, climate change, and traditional security– where it has to achieve sovereignty in order to become a sovereign Union and protect its capacity to act. Moreover, Dacoba Cerviño (2021), highlights as well that the evolution of the global landscape leads to widen the horizons of the concept to all international affairs: commercial, financial, technological, cultural, diplomatic, and military.

The common element in all of them is the need to put a united front and develop a common position that allows for the Union to speak with a single voice, but in words of Borrell (2020), change has to start first from within the European Union.

9.4. China: A Technological Giant

Professor Martínez Robles (2019) notes that China has experienced in recent decades an exponential growth by breaking away from the shackles of a centralized economy to evolve into the world's manufacturing and export centre. Acquiring because of these policies the second position as the world's largest economy. Laborie

(2020) points out that this has given the Asian country, the term of “world’s factory” due to its industrial mass production economy. Nonetheless, both scholars note that during the last years the PRC has turned more into providing services, with the country’s last strategies indicating a significant investment in infrastructure and technology. Moreover, it is expanding implementing them in Africa, Asia, and Europe, creating under certain politicians what is known as the “debt diplomacy” offering money for infrastructure loans to troubled governments, generating therefore a dependency from Beijing (Green, 2019).

China’s more recent strategies addressing technological and digital components are the New Digital Silk Road and Made in China 2025, both of 2015, and China Standards 2035 of 2018. All three of them show an ambitious aim of modernizing the country’s economy, spreading its influence in digital means, and promoting its technological giants in the international market.

The New Digital Silk Road is a subpart of the Belt and Road Initiative, a major transnational infrastructure undertaking, that was presented in 2013 in order for China to become a more decisive power in the international order and under which the country offers aid, political support, and further assistance to recipient states (Kurlantzick and West, 2020). With one overland route (*belt*) connecting China through Russia, Central Asia or the Persian Gulf, and one maritime route (*road*) linking with Europe and Africa via Singapore-Malaysia, the Indian Ocean, the Arabian Sea and the Strait of Hormuz, the PRC searches for the construction of freight and energy transport infrastructures. Moreover, the BRI aims to enable the Chinese industry to develop its supply chain through foreign trade and infrastructure constructions in Africa, Asia, Europe, and Latin America financed by the Asian Infrastructure Investment Bank (AIIB) (de Carlos Izquierdo, 2019).

According to de Carlos Izquierdo (2019, pp.9-10) two sets of objectives can be distinguished from this strategy, tactical and strategic. The tactical objectives refer to China’s interests to: “(1) reactivate its GDP, (2) obtain liquidity for infrastructure construction, (3) rebalance internal regional inequalities, and (4) occupy excess industrial capacity”. While the strategic objectives attempt to: “(1) strengthen the yuan, (2) reduce the Asian country’s energy dependence, and (3) expand its international geopolitical power.

The Digital Silk Road was announced in 2015, including to the digital BRI mechanism assistance in “telecommunications networks, artificial intelligence capabilities, cloud computing, e-commerce and mobile payment systems, surveillance technology, smart cities, and other high-tech areas” (Kurlantzick and West, 2020, p.1). Furthermore, the agenda incorporated the strengthening of internet infrastructures in a series of countries, “deepening space cooperation, developing common technology standards and improving the efficiency of policing systems among the BRI member countries” (Asia Unbound, 2021, p.1).

According to Kurlantzick and West (2020, p.1), “the DSR also provides support to Chinese exporters, including many well-known Chinese technology companies, such as Huawei”, while estimates indicate that one-third of the countries that participate in BRI, 138 at the moment, are cooperating as well on DSR projects. Both researchers highlight that in Africa, China is already responsible for providing alone more financing towards information and communications technology than all agencies and main democracies do combined all over the continent. In addition, countries in the Middle East, and parts of Eastern Europe, Latin America, and Southeast Asia are in need of high-quality technology in order to guarantee wireless phone networks and broadband internet coverage, a gap that can be filled through DSR investments that allow to finance this critical infrastructure.

The possibilities of China in these developing regions, while building the countries’ 5G networks and further digital architecture, even setting technology standards that could become the norm, has risen the alarms of democratic States, which see an increase in risks of espionage and the suppression of social rights over authoritarian practices (Kurlantzick and West, 2020).

Made in China 2025 is the second approach taken by the PRC to upgrade the country’s industry, introduced by Premier of the State, Li Keqiang, and his cabinet in May 2015. According to Kennedy (2015), it draws a direct inspiration from Germany’s “Industry 4.0” of intelligent manufacturing that employs tools of information technology to production. More precisely, as the author notes, it refers to the use of the Internet as to connect small and medium-sized companies for not only producing and innovating more efficiently but also to customize more effectively. This shows China’s intention of removing its label of the “world’s factory” that

produces cheap, low-quality products to orientate its economy towards higher value-added manufacturing sectors, like robotics, aerospace, or energy-saving vehicles (Hopewell, 2018).

Kennedy (2015, p.1), outlines the following principles for guiding the 2025 plan: “1) to have manufacturing be innovation-driven, 2) emphasize quality over quantity, 3) achieve green development, 4) optimize the structure of Chinese industry, and 5) nurture human talent”. While the role of the State is to provide the overall framework, guide and support, the strategy also calls for market institutions to effectively use intellectual property, and develop their technology standards, including the participation in the international setting of those. The plan further presents 10 priority sectors to enhance in the economy at large (Kennedy, 2015, p.1):

1) New advanced information technology; 2) Automated machine tools & robotics; 3) Aerospace and aeronautical equipment; 4) Maritime equipment and high-tech shipping; 5) Modern rail transport equipment; 6) New-energy vehicles and equipment; 7) Power equipment; 8) Agricultural equipment; 9) New materials; and 10) Biopharma and advanced medical products.

Lastly, Made in China 2025 incentives Chinese firms to invest abroad, become familiar with foreign cultures and markets, paying special attention to countries of the BRI.

The more recent strategy is China Standards 2035, which focuses on new technologies that are seen as defining over the next decade in the economic sector. Nonetheless, the final document that was expected to be released in 2020 has still not been officially announced. It is seen as a continuation and amplification of Made in China 2025, which intended to regulate the production of goods, while the new approach seeks to lay out the fundamentals for governing the systems that guide goods’ fabrication and flow (de La Bruyère and Picarsic, 2020).

The plan is the result of a two-year long symposium carried out by the Chinese Academy of Engineering and involving Chinese State champions, government entities and scholars. It is aimed at setting global rules across businesses, more precisely in the emerging technology sector. Beijing is trying to set the foundational rules by which new generation technologies, resources and exchange will be guided, hopefully at a global level. This means that first-class companies would develop standards, while second tier companies would make technology and third-tier companies would elaborate products (de La Bruyère and Picarsic, 2020).

Standards define how technologies and industries work and their interoperability worldwide, this refers to the ability of two or more systems to work together. The technical specifications are developed through collaborations between experts, industry members and companies, which after years of elaboration become standards that work all-over the world. China’s plan aims therefore to sway the functioning of next-generation technologies ranging from telecommunications and 5G to artificial intelligence by introducing their set of standards (Kharpal, 2020b).

At the moment, the Chinese Government published in March 2020, The Main Points of National Standardization Work in 2020, a document that might give a general orientation on how China Standards 2035 will finally develop. Experts point out that the manual not only seeks to strengthen the national standards but also to achieve a global influence. These standards englobe industries of manufacturing and agriculture, as well as information technology and biotechnology (Kharpal, 2020b).

Nonetheless, as Naomi Wilson (2020) outlines “the technical standards community lives by the tenets of industry leadership, openness, rules-based, consensus decision making, and voluntary adoption of international standards”. Moreover, the system allows for any player to come to the table in order to negotiate, cooperate and compete, bringing contributions while hindering the possible dominance of any player. In this sense, China’s plan will not solely influence or control the international arena. In words of Wilson (2020, p.1), it is important to bear in mind that “government proclamations such as China Standards 2035 are intended to be part inspirational, part aspirational, and part chest-puffing propaganda”.

10. State of the Art

This section will provide an overview of the European Union's approach towards digitalisation and communication technology, which for the moment has been characterized for the introduction of normative and guiding standards under its values.

10.1. The EU's Digital Strategy

The European Union is widely known by scholars for being a normative actor. The Union has developed over the years a singular personality that is described by professor Anu Bradford (2020) in her book *The Brussels Effect*, as the ability of being an influential superpower that shapes the world in its image. The academic highlights how the EU has been able to promulgate regulations that influence the international business environment and elevate standards at a global level. This has led to the Europeanization of several important elements of international trade, shaping policy areas in consumer health, data privacy and protection, antitrust, online hate speech, or environmental protection among others. Furthermore, "The Brussels Effect shows how the EU has acquired such power, why multinational companies use EU standards as global standards, and why the EU's role as the world's regulator is likely to outlive its gradual economic decline, extending the EU's influence long into the future" (Wang-Inverson, 2020).

Regarding the digital arena, the Union started to take measures concerning information and technology since 2002, as to create a common European data space. These first policies were aimed at exchanging good practices, data collection between the private-public sector and facilitating the information re-use in the public sector. In 2014 the European Commission takes a step beyond and introduces the first measures to ease the development of a data-agile economy with policies, communications, and initiatives such as (COM, 2020b):

- European Data Portal (2015)
- Digitising European Industry (2016)
- General Data Protection Regulation (2016)
- Building a European Data Economy (2017)
- Towards a common European data space (2018)
- Regulation on the free flow of non-personal data (applicable 28 May 2019)
- Directive on open data and the re-use of public sector information (2019)
- Cybersecurity Act (2019)
- Data Strategy (2020)
- White Paper on Artificial Intelligence (2020)

The von der Leyen Commission, which took office on 1 December 2019 outlines a total of six priorities that will guide the work of the Institution for the years 2019 to 2024. The second objective holds the title of *a Europe fit for the digital age*, aiming at developing policies as to prepare European countries, businesses and citizens to fit the new digital era and aim at Europe's digital sovereignty. All together with the prime target of reaching a climate-neutral Europe by 2050.

The Commission has divided the digital objective in two spectrums: (i) Europe's Digital Decade, and (ii) Shaping Europe's Digital Future (COM, 2021a). The first focuses on the vision for Europe's digital transformation by 2030 centring around four cardinal target points: (1) skills, (2) secure and sustainable digital infrastructures, (3) digital transformation of businesses, and (4) digitalisation of public services. These areas will be assisted through the implementation of digital rights and principles for Europeans, including (COM, 2021b, p.1):

- targets and key milestones

- a robust joint governance structure including a traffic light monitoring system to identify successes and gaps
- multi-country projects combining investments from the EU, Member States and the private sector

The second approach is based on three main pillars as to guarantee that Europe seizes the opportunity to give individuals, companies and governments the control over the digital transformation. These are: (1) technology that works for the people, (2) a fair and competitive digital economy, and (3) an open, democratic and sustainable society (COM, 2021c). Furthermore, as a whole, the Union aims at becoming a global role model of a digital economy, supporting developing economies in their digital transitioning, and developing digital standards that will be promoted internationally (COM, 2021c).

In February 2020, the Commission started a couple of initiatives under the first two pillars: a white paper on artificial intelligence (AI) and a European data strategy, in addition, the Revision of the Security of Network and Information Systems Directive is also scheduled for 2020 (Bassot, 2020). Moreover, it also introduced the Digital Services Act package, which “encompass a single set of new rules applicable across the whole EU to create a safer and more open digital space” (COM, 2021d, p.1). The two legislative proposals to upgrade the rules of digital services in the EU are, the Digital Services Act (DSA) and the Digital Markets Act (DMA). The core aims of both are (COM, 2021d, p.1):

- to create a safer digital space in which the fundamental rights of all users of digital services are protected;
- to establish a level playing field to foster innovation, growth, and competitiveness, both in the European Single Market and globally.

Regarding the Industry and SMEs, the Commission seeks to support the transformation towards a green and digital economy and, in the single market, to lay out the most regular obstacles faced by consumers and businesses and propose measures for better application of single market rules (Bassot, 2020).

The Commission Work Programme of 2020 outlines 21 legislative and non-legislative actions for the *a Europe fit for the digital age* objective, with the Commission having adopted for the moment seven of the initiatives. The initiatives and simplification objectives (REFIT initiatives) can be visualized in Annex 4 (CWP, 2020).

For its part, the European Council introduces in its new strategic agenda 2019-2024 a total of four priorities. Regarding the second aim, developing a strong and vibrant economic base, the digital component is very much present. It highlights the importance of the digital transformation and the need to ensure the digital sovereignty of Europe, with a common policy that embodies the European values and way of life. Furthermore, aspects as: artificial intelligence, infrastructure, connectivity services, data, regulation, or investment need to be addressed and worked by the Union (Arauzo Azofra, 2019).

As it can be seen, the new agenda and objectives of both Institutions highlight the need of the European Union to achieve its digital sovereignty and obtain its fair share of this development through the establishment of norms and standards that reflect the Union’s values. The digital transformation is a reality, and it will have a far-reaching impact on the economic, political, and social spheres. In this regard, the EU strongly bets for creating initiatives within its internal market, but that ultimately will have a possible effect as a guiding model in the rest of the global market. This notion is portrayed in the essay collection *La soberanía digital de Europa* (Hobbs y Torreblanca, 2020) by the several authors, however, they also demand a more active role, creating European digital providers and services for not having to depend on Chinese or American ones.

10.2. The Impact of China’s Digital Strategy in the EU

The singularity of the EU-China relation is the fact that there is no true consistent communitarian strategy towards the Asian country, even less in the digital realm. This is accentuated by the notion that the European Union is, for the moment, an actor lacking technological autonomy. This has put the EU between a rock and a hard place, with both the United States and China pressing the Union to either veto or include Huawei in its 5G networks. Moreover, under the Trump presidency, the US even threatened the EU and its Member States

with retaliation in intelligence or defence cooperation if they did not block the Chinese company, while China threatened with economic measures if they did it (Gacho Carmona, 2020).

As Member States have their own relations with the two powers, each country handles the situation in a different manner, but besides the differences, the common element is that all of them consider the United States to be its most important ally, while they take advantage of the benefits generated from a closer economic relation with China. Although European governments are diverting the focus of attention from the final decision on whether to use or not the Chinese supplier, as a means to avoid a geopolitical confrontation, the reality is that the majority of Member States are not vetoing Huawei. Moreover, several countries already had Huawei networks of other generations installed in their telecommunications systems for decades, as it is the case of Germany, the United Kingdom or Spain (Gacho Carmona, 2020).

In addition, Beijing has relied on bilateral relations with European states directly, emphasising its own interests and ignoring the Union's regulations. In this sense, the country uses the well-known strategy of *divide et impera* or divide and conquer, while introducing its state capitalism to strategically invest and divide the market. Using therefore, a different approach in each Member State. Furthermore, the introduction of the Belt and Road Initiative, the Digital Strategy, or the Cooperation between China and Central and Eastern European Countries known as 16+1 (China-CEEC) has further divided the European Union's states, making it difficult to reach common grounds (Gacho Carmona, 2020).

The Made in China 2025 and China Standards 2035 strategies also indicate the PRC's intention to globally influence in the digital realm and its rules of the game. Not having a common united digital stand towards the Asian country brings the EU to a very weak position and hinders its objective of achieving strategic autonomy. Even if the Union has elaborated the EU Coordinated Risk Assessment of the Cybersecurity of 5G, the EU-China 2020 Strategic Agenda for Cooperation and the EU-China a Strategic Outlook 2019, that address the more problematic points, these strategies do not close a common policy towards Beijing. At the moment, one of the most important statements is included in the last mentioned document, in which it is outlined that (JOIN, 2019, p.1):

China is, simultaneously, in different policy areas, a cooperation partner with whom the EU has closely aligned objectives, a negotiating partner with whom the EU needs to find a balance of interests, an economic competitor in the pursuit of technological leadership, and a systemic rival promoting alternative models of governance. This requires a flexible and pragmatic whole-of-EU approach enabling a principled defence of interests and values.

As it is stated in the last sentence, the Union needs a whole-EU approach, and it needs it in different areas, including the digital realm. Furthermore, it is indispensable to clarify whether it wants to consolidate itself as a normative power, as it seems it is doing with the digital objective of the Commission, and if it therefore wants to simply aim at representing the game board for the US and China or if it also wants to take part in the game.

Esteban and Otero Iglesias (2019) outline three main positions of EU Member States towards the PRC. Firstly, countries like France and Germany advocate for a more assertive shift in EU policy towards China, as they are concerned about the geostrategic implications of China's rise and call for the creation of "European champions". Secondly, Nordic countries and the Netherlands share the preoccupation of the first but oppose a public intervention in the economy as a means to confront competition with China. Lastly, countries of southern and eastern Europe with greater financial difficulties, support closer economic ties with Beijing and its investment and financing. However, even the most critical States still defend political and economic ties with the PRC.

China's pursuing for technological leadership is evident, and the Union has already addressed it. Nonetheless, as Hobbs and Torreblanca (2020) highlight, a common and clear EU digital strategy is needed if it wants to consolidate its power and take advantage of the new technological revolution. According to the authors it has to decide whether it wants to consolidate its referee position or solely serve as the game board for others. Moreover, a straightforward digital agenda towards China would allow the EU to become a possible player or achieve a combination status with the previous roles.

Chapter III: Analysis

The analysis section has been divided in two parts. The first section consists of the analysis of two groups of drivers, internal and external, with four subdivisions each (see Annex 2). All of them will be studied following four characteristics -description and purpose, aims and objectives, importance, and lastly, feasibility and future impact. The second section provides the analysis of four possible scenarios -*board game*, *referee*, *player*, and *hybrid*- that result from the previous study of the eight drivers and their respective impacts (see Annex 3). In this case, the scenarios will be studied using three characteristics -description, analysis of drivers' influence, and advantages vs difficulties. Lastly, in a separate segment a comparative analysis will draw the implications of the four scenarios, offering possible considerations and predictions.

11. Part I: Drivers

Drivers are guiding forces that determine the evolution of the main subject matter. They are composed by a series of variables that include events, documents, positions, or approaches among many others. For this specific study, the relevant data has been reorganized in two sets of drivers, internal and external, as to better portray and draw relations to the possible future scenarios. Moreover, they have been chosen from the contextualization and state of the art sections regarding their important influence in addressing Europe's strategic autonomy and outlining the need of building a Union's digital approach towards China.

This part of the analysis will use Fulton's Model H handout for identifying drivers (see Annex 5). Firstly, the thesis of the study will be presented, then the framing, and following the analysis of the drivers under four characteristics and their type of impact towards the different scenarios. The results will be summarised in Annex 6.

11.1. Thesis

The effect of the COVID-19 crisis has foresighted the start of a new decade as a mainly digital one. Nowadays it is unconceivable to think about the social, economic, and political arena without the use of digital and technological tools. The private and professional spheres are all influenced by new technologies and current events have strongly speeded-up its reach. Although it is still unknown how exactly these mechanisms will change and impact the course of action of States and individuals, the reality is that the future will undoubtedly be digital. This idea has not gone unnoticed by the European Union, which under the new von der Leyen Commission 2019-2024 has included the objective of *a Europe fit for the digital age*. Nonetheless, if the EU wants to consolidate itself as a strong actor, a series of aspects need to be tackled.

In order to achieve its objectives of the Global Strategy 2016 (EUGS) and pursue strategic autonomy, the Union has to address various agendas, including the digital one. In this sense, it has to decide where it wants to lead and how it wants to lead in this field: as a game board, a referee, a player or a combination of them. This decision will also depend on the strategy towards China and the country's digital advancement.

11.2. Framing

Data shows that the People's Republic of China will become the country with the highest percentage of GDP allocated to investment in research, development, and innovation. Furthermore, during the last decade, Beijing has launched and even re-launched a number of strategies -BRI, DSR, Made in China 2025, and China Standards 2035- that have strong links with digital components, mostly the three last ones. This shows that the Asian country has a clear view of what it wants and, at least, certain methods of how it wants to achieve it.

In addition, China's advancement in the digital realm has triggered a confrontation with the United States, which sees its hegemony and interests disrupted by the interference of the PRC in many parts of the world, including European countries. In this regard, the EU cannot accept to be the board game of the United States and China.

This undoubtedly forces the Union to review its own strategy towards the Asian country in these matters and start moving forward with a single voice in digital affairs, which, as an important component of the economy, will be indispensable in the future.

11.3. Drivers

The division of drivers in internal and external depends on whether the driving force comes from within the European Union or from the outside of its borders respectively. This distinction allows to better size the influencing forces regarding the Union’s digital strategy towards China and its digital autonomy.

Figure 1 depicts a table with the final composition of the selected drivers. All of them are further divided in a series of points that will be studied and analysed in the corresponding section through the use of four characteristics, as shown in Figure 2, including their type of trend or impact, displayed in Figure 3, towards the four possible scenarios.

Figure 1. Internal and External Drivers

INTERNAL DRIVERS	EXTERNAL DRIVERS
Strategic autonomy	US-china rivalry
EU digital initiatives	China’s tech giants
Approach to china	China’s strategy in the eu
Member states	COVID-19

Source: Own elaboration

Figure 2. Analysis of Drivers Through Characteristics

CHARACTERISTICS
Description and purpose
Aims and objectives
Importance
Feasibility and future impact

Source: Own elaboration

Figure 3. Driver’s Trend/Impact Towards Scenarios

TREND/IMPACT
Positive-negative
Strong-weak
Neutral

Source: Own elaboration

a) Internal drivers

Regarding driving forces coming from within the European Union a total of four elements can be identified. These will be studied and analysed below.

1. Strategic Autonomy

Strategic Autonomy is not a new concept in the European Union's agenda. It has been addressed over a period of time by both the Union itself and figures of the Member States. This concept is important in the sense that, for the EU to be able to be a political and economic union that acts as a global player, it has to be autonomous.

A total of two aspects can be analysed when addressing Strategic Autonomy. On the one hand, the EU-Global Strategy of 2016 and, on the other hand, more recent statements of political leaders in European Institutions, reports and works, already introduced in the contextualization section, which describe new forms of autonomy (see Annex 2).

Characteristics

1.1. EUGS 2016

i) description and purpose

The EU Global Strategy 2016, *Shared Vision, Common Action: A Stronger Europe*, is the new foreign and security approach that replaces the previous *European Security Strategy* of 2003 under Javier Solana. Former HR/VP, Federica Mogherini, introduces the updated doctrine in a difficult time for the European Union, in fact, it can be seen as a response to certain challenges like the effects of the financial crisis of 2008, the migration and refugee crisis of 2015, social upheavals in the East and South, relations with neighbouring and third countries, trade relations, and lastly, security concerns englobing terrorist attacks, energy, technology, and communications.

All these matters affect the internal and external security of the Union, moreover, they condition its ability to interact in the global sphere and participate in international affairs. In this sense, the Strategy calls for a renewed vision of the Union's approach towards the foreign and security field in which the main purpose is to establish a commitment for future common work and solidarity between Member States.

The EUGS outlines the idea of a common action with the aim of defending the Union's values, interests, and vision. Nowadays, no Member State can face the world's challenges on its own and no threat affects only one of them but all. Therefore, the document provides a guidance for the EU as a whole of what specific topics to address, and how to achieve them, enabling for a stronger Europe.

ii) aims and objectives

Basing on the previous aspects, the EUGS addresses four aims: a global strategy that promotes the citizen's interests, four principles guiding the external action (unity, engagement, responsibility, and partnership), five priorities of the external action, and lastly, the implementation of the vision (a credible, responsive, and joined-up Union).

The five guiding objectives of the Strategy regarding the external action are: the security of the Union, state and societal resilience in the East and South, an integrated approach to conflicts and crises, a cooperative regional order, and a global governance of the Union for the 21st century.

On the one hand, within the section of the cooperative regional order objective, out of the numerous mentioned topics, the importance of China cannot go unnoticed. Although the subparagraph, 'a connected Asia', refers to the Union's direct connection of its own prosperity with security in Asia, China is the only specifically discussed country apart from the ASEAN framework. This shows the EU's significant interest in continuing its relationship with the PRC, more precisely, to further develop trade and investment actions. However, Brussels is aware of the need to accompany this relation with the pursuing of a level playing field, protecting intellectual property rights, seeking greater cooperation on high-end technology, reforming the economic dialogue, and securing human rights and climate protection.

On the other hand, referring to digital and technological aspects, the EUGS does indeed include them in numerous ways, principally, as part of the global governance objective and a credible Union when implementing the overall Strategy. Firstly, the need to secure a digital economy, protect the EU's values in the digital world, and support multilateral digital governance. Secondly, to seek research and technology for defence cooperation, and assure communication technology for securing integrity data and the EU digital space. In addition, to guarantee a global cooperation framework on cybersecurity, while respecting the free flow of information, more importantly, for critical infrastructures within the European digital space.

Lastly, the overall guiding principle of the EUGS is the concept of strategic autonomy, which in this case is founded on a military and defence nature.

iii) importance

The Strategy lays out the direction to be followed by the Union in its external and security dimension. This document presents a declaration of intent, what the EU has to do and with whom it has to do it in order to evolve as a major global power. It is of crucial importance in the sense that it will guide the rest of decisions and actions taken by both EU institutions and Member States. In this sense, the Strategy brings up a series of relevant aspects for the Thesis's study.

On one side, it introduces what can be considered the leading doctrine from now on of the Union, pursuing strategic autonomy. The Strategy perceives this concept as the ability of the EU to defend its territory and act militarily in its neighbourhood without having to depend on external powers like the United States. The vision is to acquire the security and defence capability as a means to operate independently when taking decisions and executing actions, helping to consolidate the Common Foreign and Security Policy (CFSP) and strengthening the Common Security and Defence Policy (CSDP). The defence of the Union needs to be achieved by the Union itself, maintaining close cooperation with the NATO framework. Furthermore, this strategic autonomy strengthens the Union's ability to promote peace and security within and beyond its borders. Lastly, the exercise of autonomy itself has to embody the principles and values of the Union, which are displayed in Articles 2 and 3 of the Treaty on the European Union.

On the other side, it includes the two components of this study, China, and digital and technological aspects, from an economic security, defence, and military perspective. The PRC appears as a priority for the Union, more importantly, it is the only Asian country that has been more extensively addressed, being just Japan, the Republic of Korea, and Indonesia mentioned to refer to its strategic ties. China comes out as a major actor and the Union is aware of its relevance and potential. Investment and high-end technology represent a key cooperation arena, but they have to be accompanied by a dialogue on economic reform, human rights, and climate protection. This last incorporation sets out the standards by which the Union is willing to, and should, establish negotiations. Furthermore, it highlights that the values and the "European way", represent the method for concluding agreements. In fact, this is more recently appreciable with the introduction of the von der Leyen Commission's objective titled "protecting our European way of life". Regarding the digital and technological components, the Union is conscious of the need to protect the European digital space. High quality communication, critical infrastructure, and the protection and flow of data are indispensable for the safety of States, the industry, and lastly citizens. Nonetheless, for the moment, the discussed arena is mostly related to the defence realm. With the EU's values as a mentor, the actions in this field aim at protecting the European territory and its businesses while engaging in external cooperation for military and defence matters.

Finally, it can be said that all the discussed topics, including the ones studied above, influence in assuring the Union's strategic autonomy and displaying it from a security and defence perspective.

iv) feasibility and future impact

The EUGS 2016 lays out the way ahead for the external and security relations of the EU and therefore influences many of the future decisions that have been taken by the Institutions and the Member States.

Even if the military and security component guide the action, it introduces an important objective for the Union to pursue if it wants to evolve and be part of the international arena. The EU needs to be autonomous,

and it needs to become independent from third States if it really wants to consolidate itself as a global power in the 21st century.

The path towards the type of strategic autonomy described in the Strategy will take time and patience, but it is indeed feasible. Security and foreign capability do not mean to create a military Union with a state-like structure. It refers to the commitment to use the Union's mechanisms provided for in the Treaties and NATO's framework, for whom it may apply, for taking the necessary steps from an EU perspective. More importantly, it means not having to rely on others' mercy. The Union itself started since 2016 to officially include this aim in its agenda and Member States have joined in this pursuit. However, the political commitment will ultimately guide the speed of action.

1.2. New Forms of Autonomy

i) description and purpose

During the last years, European personalities, scholars and analysts have addressed the notion of strategic autonomy and further developed its original meaning.

The concept has its foundation in the defence industry, which contributed to its single-sided utilization. Nonetheless, over the years, the evolution of the international panorama inevitably widened the initial connotation to include further spectrums of the international relations playing field.

The message is clear, if strategic autonomy is strongly linked with assuring security and defence, in today's world it can no longer be achieved through military means alone, it needs to include other fields. Current HR/VP, Borrell, as other politicians and intellectuals are pursuing to include in the Union's agenda the inclusion of new forms of autonomy that contribute to the overall objective of achieving strategic autonomy.

ii) aims and objectives

Although there is no single list of topics of a comprehensive autonomy-agenda by the Union at the moment, concerning the retrieved information in the contextualization section, the following tendency can be predicted. Moreover, a parallel can be drawn out of the six objectives of the von der Leyen Commission, which address democracy, the European way of life, economy, citizens, digitalisation, and the environment. All of them are in fact undoubtedly intertwined and the positive realisation of one relates to the proper management of the resting aims. This correlation also indicates how strategic autonomy is no longer composed by one topic or specific group, because in a globalised world, the elements of international relations have expanded.

First of all, one distinguished arena is the traditional security realm, with its agenda being composed by diplomatic and military actions. This point concerns the original meaning of the concept and is embodied by the EUGS 2016. In this spectrum, autonomy refers to the capacity to defend the European internal and neighbouring territory without having to rely on external actors. Moreover, performing traditional foreign, military, and diplomatic actions that allow for the consolidation of a strong position in the international sphere, being able to tackle security crisis and manage traditional resources.

Secondly, the next recognizable arena is the economic realm, constituted by commercial and financial activities. The economic performance is a major indicator for foreign policy power and therefore, for acquiring strategic autonomy. The EU is an important economic actor with a considerable global GDP percentage and counts as a principal trading partner in the international sphere. The European Single Market is unique in its kind and the largest worldwide, always defending and promoting the Union's values. This offers the EU an advantageous position in external relations, but it has fallen behind countries in North America (US, Canada, and China), and in East Asia (China, Japan, South Korea, and the ASEAN framework). The Union has economic agreements with all of them, but the strength relies on whether it is capable of implementing and introducing the respect for its norms, values and principles.

The third arena is the technological and digital realm. Even if it has been already appreciated for many years that the future will be digital, the current pandemic has more recently shown the impact and indispensability that technological and digital components have for the national and business security, the working sphere, and private life. Technical innovation and knowledge are the future, and they will draw the lines along which

actors have to interact. The element directly referring to autonomous sovereignty is the notion that those who are able to produce, set the standards, and regulate the use of future technologies will succeed in geopolitical competition and therefore, consolidate as major powers. Not surprisingly, the Union has taken its first step with the *a Europe fit for the digital age* objective of the Commission, in which it mostly opts for introducing standards and rules based on European values.

The fourth arena is the climate change and energy realm. Both elements go hand in hand in the sense that, achieving climate security and pursuing a green objective inevitably have to touch upon securing energy supply and production. With a growing international pressure on taking tougher actions that respect and protect the environment, those actors that develop green alternatives and allow for environmental-friendly options of energy sources will position themselves in a leading strategically autonomous position. Here as well, the Union has realized the magnitude of this topic and introduced the '*a European green deal*' objective, including the aim to become the first climate-neutral continent with the model of a modern, resource-efficient economy.

The fifth arena involves the cultural and values realm. Although at first sight it might wonder why it is connected with autonomy, the reality is that it is of much importance for an actor to consolidate its power and influence when interacting with the outside world. The capacity to make others respect one's core political, judicial, and social elements when engaging in cooperation, symbolizes strength, power, and influence, leading to an autonomous position over the rest. This is one of the most precious objectives of the Union, which has focused with *a stronger Europe in the world*, *a new push for European democracy*, and *promoting our European way of life*, to promote and protect its most important values in the international relations sphere. These are the respect for the rule of law, the protection of human rights, the strengthening of democracy, the pursuing of multilateralism and the promotion of a rule-based global order.

Lastly, the health realm. The economy is the engine of states, but without a proper health system to protect citizens and mechanisms to respond towards crisis situations, states are doomed to weaken. Beyond the cultural and democratic element of assuring a good medical assistance, it is a major requirement for an actor if it wants to consolidate as a power and gain a strategic position. This is mostly appreciable with the effects of the pandemic that have shown the potential of elaborating, designing, and commercializing all variants of medical and pharmaceutical products.

iii) importance

For the purpose of this work, the address of further areas of strategic autonomy has a couple of relevant takeaways.

The most important one is the inclusion of the technological and digital agenda. Specialists, governments, and the EU have recognized the need to set a guiding path in this field and direct the way forward for the Union as a whole. There is no doubt that the future will be digital, but the true impact is still unknown. The next crucial aspect is the relation between digitalisation and strategic autonomy. Growing from the traditional vision of security with only military intervention capable of providing safety, nowadays many other actions contribute to this end. One of them is the secure design, control, and commercialization of digital and technological tools, which are present at all the economic, political, and social levels. The dependency from external providers or the use of foreign mechanisms without a common set of standards to be respected when being used in Europe, hinder the Union's capability action. Its proper definition, design, control, and execution are indispensable for gaining autonomy and consolidating as a power.

iv) feasibility and future impact

The mentioned objectives of the von der Leyen Commission, including Borrell's statements and further scholars' work show a strong intention and need to pursue a digital agenda fit for an international power. However, the feasibility of achieving autonomy in this field is difficult because of lacking European technological giants compared to American and Asian ones, but it is feasible concerning other aspects. These relate to a more strategic position when focusing to develop standards, secure users rights and provide for

security aspects even if providers are foreign. Steps that the Union seems to have opted to take. Lastly, the strength and reach of these aims and policies will determine the degree of success.

Trend/impact on scenarios

With the previous analysis, the following trends of strategic autonomy towards the four scenarios can be drawn (see Annex 3) that will be further studied in the second section of the analysis chapter.

Regarding *board game*, the driver has a neutral impact on its fulfilment. This means that the achievement of strategic autonomy does not positively or negatively affect the likeliness of the Union to serve as a playing field for the US-China digital race.

For the realization of the *referee* scenario, this driver does present a weaker positive impact. In order to become a ruler and implementing standards with possible global-reach, strategic autonomy is important in the sense that it allows for the Union to consolidate power. Nonetheless, in the end the formulation of policies and their implementation strength depends on Member States and EU Institutions themselves.

This driver strongly affects in a positive manner the capacity of the EU to serve as a *player*. Strategic autonomy would not only mean to have standards and guidelines but the capacity to act as well with one's own giants and compete with others in the international sphere. However, a digital strategy has to be consolidated first.

Finally, strategic autonomy has a positive impact on achieving a *hybrid* scenario with combinations of the three previous models, as it positively affects the second and third.

2. EU Digital Initiatives

The European Union has not ignored the relevance of including digital rules in its legal framework. Moreover, it has proven to be indispensable in order to guarantee the protection of the Internal Market, the Union's businesses and its citizens. At the beginning, the majority of norms were mostly directed at securing the treatment of information and its flow between the EU Institutions and then between the private-public sectors. As of 2014 the European Commission starts to address the objective of developing a data-agile economy introducing more ambitious and far-reaching policies, initiatives and communications.

For the purpose of the study, two timelines can be differentiated. The first period expands from 2016 to 2019 and englobes a series of mechanisms focused on regulating and protecting the management of data that have already been put into practice. The second period refers to the new set of rules introduced by the new legislature from 2020 to 2024 which is starting to be implemented and with some acts still being under voting (see Annex 2).

Characteristics

2.1. Previous: 2016-2019

When studying the Union's digital norms, it is crucial to look at what has already been achieved and implemented. This allows to identify the priorities of the Union and how they have been approached.

i) description and purpose

The legislation of the EU between the years 2016 to 2019, before taking office the von der Leyen Commission, has strongly set the focus on assuring data use, management, and protection. More precisely, concerning information and technology in the economy. It can be said that the overall purpose was to create a common European data space with a coordinated implementation and exchange of good practices within the EU territory.

The Commission commits with its plans and policies to accelerate innovation and production growth, while boosting the EU's economy in the global market. In this regard, the intention is to strengthen the Union as a major player with a competitive economy.

ii) aims and objectives

For the purpose of the study, eight digital initiatives can be highlighted with the following principles:

- *European Data Portal*. Implemented in 2016, it responds to the aim of establishing a pan-European repository hosting information of the public sector being open for its re-use in the EU. In addition, it provides for a training centre with the objective of guaranteeing the proper use and management of these open data all over the territory. This shows the Union's awareness of the high value that information has and how its use enables actors to develop their own personal or commercial ideas. However, in a rule-based territory, guidelines need to be established as to guarantee the respect of data and assure an honest employment of the same.
- *Digitising European Industry*. Introduced in 2016, the principal aim of this initiative is to digitalise the European industry under a common framework with the objective of allowing companies, businesses, scholars, and public authorities to make the greatest profit when using the new generation of technologies in their work. It allows to contribute for the enhancement of products and services, being more innovative, efficient, and modern. Regarding the regulation aspects, data technologies standards are considered as a priority, mostly in cybersecurity and the free flow of data. It is without a doubt that the EU has become aware that its vision of the Internal Market, cannot succeed in the 21st century without being prepared for the new generation of technologies. Moreover, it commits to take a more regulatory role in this field, empathising on the protection of European values and people.
- *General Data Protection Regulation (GDPR)*. This legislation introduced in 2016 and operating since 2018 is a major milestone of the EU, regulating the use and processing of personal data by individuals, companies, or organisations in the EU. Furthermore, it will not only bound those entities located within the EU territory, but also those outside the region if they target in any way people living in the Union. A crucial mechanism when dealing with foreign providers and, for this study, regarding China's tech giants offering products and services to EU citizens. This Regulation can be said to embody the soul of the Union by putting consumers at the heart of the matter. They have to consent, easily understand how their data will be used, and simply remove their consent, including the famously notion of having the right to be forgotten. This is a major step in the digital realm, creating a rule-based territory where economic revenue, security issues and un-democratic practices for the obtention of data will be strongly targeted. It creates therefore, a unique model allowing foreign entities to operate in the Union's territory but always under the Union's rules.
- *Building a European Data Economy*. The Communication of the European Commission was adopted in 2017 aiming at establishing a European Single Market governed by modern and innovative rules, pushing for a competitive and innovative digital economy. It introduces a series of conclusions for speeding up the transition towards a data-driven economy as good quality assurance, improved framework, cooperation between involved actors, action plan for public-private partnerships, identification of priorities, infrastructure, and standards. Once again, the EU is conscious of the future scenario of the economy, which will transform into a digital driven market. Therefore, companies, business and national authorities need to be prepared as to operate in a modern and competitive environment, always following the rules of the game.
- *Towards a Common European Data Space*. Building upon the previous steps, in 2018 the Commission proposes in its Communication a series of measures striving to help the already introduced aim of creating a common data space in the EU. The objective is to reach a strong digital zone that allows for the design and development of new products and services based on data. This highlights that for the Internal Market to be competitive and consolidate its influence in the coming future it has to technologically modernize itself.
- *Regulation on the free flow of non-personal data*. This piece of legislation introduced in 2018 and applicable since 2019 has the aim of eliminating obstacles to the free flow of non-personal data between Member States and IT systems across Europe. This approach can be seen as a response to the growing digitisation of the economy, where the dependency on data is more and more significant. Therefore, with the

objective of benefiting from the advantages that a data economy offers, like adding value to already existing products and creating new models of business, the free movement of non-personal data is key for its achievement. Moreover, the goal is to allow private and public entities to store, process and collect this non-personal information for improving the market economy in the EU.

- *Directive on open Data and the re-use of public sector information*. Introduced in June 2019, amending previous legislation of the Public Sector Information (PSI), this new Directive goes beyond the already established mechanism by updating the legislative framework to the new technologies and by addressing the rising barriers that still difficult the re-use of public information within the EU. The Union continues to target the enhancement and modernization of the Internal Market in which data is the key element for success. Crucial objectives are a minimum harmonisation of national norms and practices regarding the re-use of public data and the adequate advancement of the information society.
- *Cybersecurity Act*. Entered into force in June 2019, it incorporates an EU certification scheme and establishes a stronger mandate of the European Union Agency for Cybersecurity (ENISA) founded in 2004. As it can be seen, the aim is to address the cybersecurity dimension of the Union that strongly impacts its economy, political sphere, and social lifestyle, assuring for secure and beneficial digital goods and services. Crucial objectives that have been incorporated are the strengthening of EU's resilience and digital leadership, pursuing a green and digital economy, while securing network and information systems (NIS), fighting cyber-attacks and fraud, protecting children online, and securing 5G networks. This initiative has been followed by several other documents concerning cybersecurity as to widen the knowledge on this field and help Member States with their approaches. In a digital world, the cyber component cannot be ignored and providing a common certification scheme is a major step needed, nonetheless, norms are not only enough as capabilities, knowledge and capacity are indispensable to be able to tackle the possible threats.

iii) importance

This list of initiatives does not incorporate all the legislative and non-legislative approaches taken by EU Institutions, but the selected mechanisms are those of importance for the study. First of all, because, in the selected timeline, they offer a clear vision of the direction of the Union in digital affairs, and secondly, because they address aspects that lastly embody the role of the EU in this field.

The Union is very much aware of the need to incorporate at a community level the regulation of digital aspects, mostly because they affect the Internal Market, as well as businesses and citizens' rights and liberties. In general terms, this field offers two sides, one concerning opportunities of growth and innovation, and another concerning rights, standards, and protection. For the moment, even if the EU has addressed both, it has slightly focused more on the second one while trying to coordinate and develop a common framework within the European territory.

This is without a doubt the important element of the Union regarding its digital initiatives. In fact, it shows the beginning of the idea known as "Brussels Effect", inspiring with its norms and standards, models that have been imitated abroad. This period of 2016-2019 is mostly concerned with the data component, personal and non-personal, and its regulation in the market economy. Although the intention is to help to generate growth and innovation with this information, the individual is always put in the centre of attention, safeguarding their rights and integrity. Ultimately this is the core element and distinguishing mark of the Union, which introduces its values into the digital realm.

iv) feasibility and future impact

The presented set of digital documents between 2016 to mid 2019 are the result of previous initiatives and recommendations, that either amend old programmes or introduce new more precise legislative proposals. All in all, the mechanisms have been already put into practice, showing its positive feasibility. Data regulation is fundamental, and it is indispensable for the proper functioning of the Internal Market and all its related elements.

The crucial point regarding this driver is its future impact. As it will be shown with the new set of initiatives starting with the new Commission, the regulatory aspect has been pursued by the Union from the start and continues without a doubt to be at the centre of the agenda.

2.2. New: 2020-2024

The von der Leyen Commission, which took office in December 2019, continues with the previous digital trend but goes a step beyond by incorporating a digital priority titled, *a Europe fit for the digital age*, and completing it with two blocks of activities.

i) description and purpose

This priority has a clear and ambitious purpose in mind, namely preparing the European Union for the digital future. The approach is founded on the respect and fulfilment of the European values of which individual's rights and democratic principles were at the core. Now, even if these continue to be highly addressed in the new proposals, a new principle is guiding the digital action, the protection of the environment and the pursuit of a green economy. Moreover, the Commission intends to official incorporate a set of 'digital principles' and 'digital rights' that, beside the above-mentioned topics, also include children's protection, health and intellectual rights and freedom of expression, to lead the actions in this field.

The initiatives now centre around data, technology, and infrastructure, again with a strong vision placed on standards. It targets individuals, businesses, and authorities in order to provide for a digitally competent market and society. Furthermore, it is set to empower the EU thanks to the new generation of technologies.

ii) aims and objectives

The priority is further divided in two blocks, *Europe's Digital Decade* and *Shaping Europe's Digital Future*.

The first, *Europe's Digital Decade*, can be considered a declaration of intention with the aim of achieving the vision for the Union's digital transformation by 2030. In this regard it establishes four objectives with the following goals for action:

- *Skills*: Without qualified professionals, the advantages of new technologies cannot be properly used. Therefore, it is indispensable for the Union to reach 20 million ICT specialist and assure that at least 80% of the total population have basic digital skills.
- *Secure and sustainable digital infrastructures*: The entire EU territory has to be digitally 'connected' as to transition from the old economy and society to a more modern and technological one. This means to enable gigabit and 5G connectivity for everyone and everywhere, cutting edge semiconductors, around 10,000 climate neutral and secure data-edge and cloud nodes, and innovating in computing with the first computer with quantum acceleration.
- *Digital transformation of businesses*. Not only individuals, but companies and their employers need to face a strong digitalisation. The Union aims at securing that 75% of EU companies use Cloud, Artificial Intelligence and Big Data, financing innovators for doubling EU unicorns, and continue the digital intensity of SMEs.
- *Digitalisation of public services*. The public sector is a crucial part of the economy, and its technological transformation has to be guaranteed as well. The Union pushes for the complete online accessibility of key public services, the total access by citizens to medical records or e-Health, and 80% of citizens using a digital ID.

The implementation of these four points will centre around specific targets and milestones, a joint governance, and multi-country projects with investments from the EU, Member States, and the private sector. This shows a major commitment of putting words into action and going beyond the development of standards by also including the implementation of action-plans that prepare the Union as a whole for the digital future. In addition, the Commission intends to accompany this digital transition activity with 'digital principles' and 'digital rights' that still have to face an official introduction.

The second block continues with the tendency of previous years and focuses on legislative and non-legislative proposals that follow around three pillars: technology that works for the people, a fair and competitive digital economy, and lastly, an open, democratic, and sustainable society. A total of nine policy objectives can be identified englobing 21 initiatives introduced in 2020 of which seven have been adopted so far (see Annex 4):

- *Europe fit for the digital age*. This consists of the Strategy for Europe – Fit for the Digital Age and a Digital Education plan. Once again citizens need to be prepared to know how to safely use digital goods and services, and benefit from the advantages this field offers. Enabling innovation, modernisation, and growth.
- *A European approach to Artificial Intelligence*. Completed by the White Paper on Artificial Intelligence, the European Strategy for Data, and a Follow-up to the White Paper on Artificial Intelligence, including on safety, liability, fundamental rights, and data. AI is one of the most prominent new technologies at the moment and its future potential is still unknown, therefore setting standards and orientating its function concerning data processing is vital to secure the Union's values.
- *Digital services*. Composed by the Digital Services Act for creating a safer digital space with the protection of users' rights that allows for a playing field open to innovation, growth, and competition in the EU and abroad.
- *Increasing cybersecurity*. Formed by the Review of the Directive on security network and information systems (NIS Directive) that seeks to further enhance the methodology in this field.
- *Digital for consumers*. Consisting of the Common chargers for mobile phones and similar devices and the Review of the Roaming Regulation. This offers for a better coordination of the Member State's services towards consumers, a key element for the proper functioning of the Internal Market.
- *A new industrial strategy for Europe*. Including the Industrial Strategy, the Single Market Barriers Report, the Single Market Enforcement Action Plan, the SME Strategy, and the White Paper on an Instrument on Foreign Subsidies. The digitalisation of the industry has already started, now it is crucial to specify the approach.
- *Aviation services package*. Formed by the Revision of airport charges and the Revision of the provision of air services.
- *Towards a European research area*. Englobing with the Communication on the Future of Research and Innovation and the European Research Area, and the Communication on Horizon Europe research and innovation missions. The digital future does not only mean to be prepared for it, but to design it as well. Promoting and advocating research activities and innovation opens up a window for European businesses and companies to develop new digital services and goods that directly compete with foreign products. Strengthening the Union's position.
- *Digital finance*. Completed by the Action Plan on FinTech including a Strategy on an Integrated EU Payments Market, a Proposal on Crypto Assets, and a Cross-sectoral financial services act on operational and cyber resilience.

All of them address skills, competences, and standards, directly targeting education, digital services, cybersecurity, consumers, artificial intelligence, the industry, aviation, research, and finance. It can be seen that the Commission sees these seven topics as primal for the digital future and related to the three pillars of citizens at the centre, a rule-based digital economy and a democratic and green society.

iii) importance

This driver is without a doubt a major factor for predicting the possible future scenarios in the digital sphere.

The importance of the first period of 2016 to mid 2019 is mainly the fact that it sets the way forward. By focusing on data management and setting standards it shows the Union's commitment of strengthening its image of an institutional ruler, at that time, mostly within its borders. This has allowed for the pursuit of a common framework, as the Union has to guarantee that all Member States follow along and implement

the same tools when dealing with personal data management in the economy. Moreover, it shows that the ambition of preparing for a digital future has to start first within the EU and then move beyond.

The relevance of the second period from 2020 to 2024 is divided between *Europe's Digital Decade* and *Shaping Europe's Digital Future*.

The first block is very important in the sense that it introduces actions and targets. It focuses on not only setting the rules but improving the field itself, creating a fit technological and digital society, as well as a solid body of experts. It embodies the activity of digital transitioning by converting norms into action and transforming them into solid results that produce digital services and products worthy of a modern and competitive economy.

The second block targets more precise aims and sets the path of what topics the Union considers indispensable to address when developing the digital priority. It includes norms and standards, but it also introduces actions and precise activities.

All of them contribute to a vital element, the consolidation of the Brussels effect. The added value of this driver is the fact that the Union strengthens the notion that it is a normative power and that it can influence and set standard models with a global influence. Once the framework has been created within the territory of the Union, it forces foreign companies and digital providers to adjust to the EU norms if they want to operate in the Internal Market or just provide services to EU-located citizens. This has in turn an influence on third States to adopt similar standard based on democratic principles that consider the model to be convenient.

iv) feasibility and future impact

Many of the studied initiatives have already been implemented, being just 14 of the *a Europe fit for the digital age* under voting. This indicates that the Union knows what its command is and how it has to implement it. Therefore, the feasibility of these initiatives is indeed positive. Nonetheless, the future impact will depend on the details that the proposals can or cannot include and, therefore, how far they can go. It is clear that the common framework of standards, data and infrastructure is present, but the capacity to act as a digital giant is, at the moment, very reduced because digital norms do not allow for the transformation into a digital player with international reach.

There is no doubt that this driver has an enormous impact on consolidating the Union as a referee, but it seems that the will to become a player is also present thanks to the introduction of specific activities and objectives that seek to produce innovation, investigation, and production in the digital realm.

Trend/impact on scenarios

Based on the previous study, the following trends of EU's digital initiatives towards the four scenarios can be drawn (see Annex 3) that will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a neutral impact on its fulfilment. This means that the development of digital initiatives does not positively or negatively affect the likeliness of the Union to serve as a playing field for the US-China digital race.

For the *referee* scenario, this driver presents a very strong positive impact. In order to become a ruler and implement standards with possible global-reach, digital initiatives aiming at establishing standards and guiding principles are important in the sense that it allows for the Union to consolidate the Brussels Effect.

For serving the *player* scenario, this driver considerably affects in a positive manner the capacity of the EU to become an active actor in this field. Digital initiatives would mean to have standards and guidelines but, if introduced properly, with the capacity to influence and set global rules respected by other important technological powers. Element that allows for a more levelled competition in the international sphere.

Finally, digital initiatives have a positive impact on achieving a *hybrid* scenario with combinations of the three previous models, as it positively affects the second and third.

3. Approach to China

A total of four documents can be analysed when addressing the Approach to China implemented by the Union. These are in chronological order the EU-China 2020 Strategic Agenda for Cooperation, the 2016 Strategy on China, EU-China a Strategic Outlook 2019, and the EU-China Comprehensive Agreement on Investment (CAI). The singularity of all of them is that even if they incorporate commitments and principles, none of them actually close a common European policy towards the PRC.

Characteristics

3.1. EU-China 2020 Strategic Agenda for Cooperation

This document signed in 2013 will be the only element studied before the established framework of 2016 for this Thesis, as it is relevant in the sense that it highlights the first sectors in which both countries have been interested in implementing a dialogue.

i) description and purpose

This document has the purpose of promoting a comprehensive strategic partnership through the implementation of respective development plans during the following decade. Both actors are aware of the potential of the other and the benefit of maintaining a strategic partnership with a power of the international sphere.

ii) aims and objectives

The fields in which cooperation has been aimed are the following with the respective objectives:

- *Peace and security.* In a globalised world the impact of certain events of conventional and non-conventional matter, have a global reach. Therefore, the pursuing of development, cooperation, and multilateralism are at the core of interest for both actors. Seeking to contribute for peace, international dialogue, coherent responses and coordinated action.
- *Prosperity.* Concerning the economic sector, the strategy distinguishes four areas of interest, trade and investment, industry and information, agriculture, and transport and infrastructure. The guiding principle here is the spirit of mutual benefit, including open and transparent markets at a level-playing field. Concerning the information aspect, it only mentions an increase in dialogue in IT, Telecommunication and Informatisation.
- *Sustainable development.* With the objective of contributing to innovation, inclusive and sustainable development, the document points out ten initiatives: science, technology, and innovation; space and aerospace; energy; urbanisation; climate change and environmental protection; ocean; regional policy; social progress; public policy; and cooperation on global development. With reference to technology, it only targets cooperation initiatives in food, agriculture, urbanisation, water and health, including energy. At this time, no approach is made towards a digital cooperation concerning digital services and products.
- *People-to-people exchanges.* Both actors are very interested in enhancing understanding between the societies. Therefore, the objectives introduced are culture, education and youth, and the facilitation of people-to-people exchanges regarding tourisms, legal migration, and diplomatic travel.

iii) importance

The Strategic Agenda for Cooperation is relevant in the sense that it highlights the willing cooperation between the EU and the PRC. This shows that relations were on good terms at the time and that both consider each other as an important actor in the international sphere. It seems that Beijing shares with Brussels the need to continue developing strategic cooperation in a multipolar world where all spheres are more and more connected. In this regard, it can be considered that it sets the way forward by naming which are the areas that both consider of relevance to establish a coordination. Among them can be found the information and technology aspect. Although they do not address today's elements of new technologies, it indicates that the field is in fact of relevance for economies.

iv) feasibility and future impact

This document is not a statement for a specific commitment, only the purpose of continuing enhancing the strategic partnership is outlined. Ultimately no obligation has been introduced nor a policy has been established. In this case, the feasibility aspect has a minor effect, but the future impact can be of relevance. The digital realm is addressed only at a certain level, this initial introduction can serve as a booster for addressing now more modern digital elements that can secure an EU digital strategy towards the PRC.

3.2. 2016 Strategy on China

The Strategy on China of 2016 is considered to be the primal guiding document for the Union's engagement towards the PRC. It responds to the need of drafting into paper the Union's guidelines towards the country, which has already turned into a major global economic actor.

i) description and purpose

In general terms, the strategy promotes reciprocity, fair competition, a level-playing field, and mutual benefits of the economic, investment, social and environmental relation. Furthermore, it calls for security responsibilities of the UN and the G20, including the completion of sustainable goals. Furthermore, it builds a positive agenda that addresses differences in a constructive manner, taking into consideration China's growing role in the international sphere.

ii) aims and objectives

The document introduces a total of five aspects that will guide the aims and objectives of the strategy:

- *Principles of engagement.* The elements that guide the relationship between both are the principle of reciprocal benefit, China's growing responsibility and its respect of the rules-based international order, a Union's strong and unified voice, protecting human rights, confirming China's one policy, and a broad approach towards the Asia-Pacific region. This shows that the Union is aware of the PRC growing influence and its global actions, it has to recognise and support it, but always demanding the respect of the international order and democratic values.
- *Prosperity and reform agenda.* In China's search for economic and social reform, the Union commits to support the country as a partner, seek for a comprehensive agreement on investment to boost trade, promote research, innovation, and digital economy, and lastly to continue with enhancing the connectivity and the people-to-people links. In this document, the Union directly includes the digital economy and new set of technologies as a major field of cooperation opportunity, always under the condition of respecting the EU values. Nonetheless, no specific policy or action is introduced beyond the express interest to start doing it and alerting of China's high protectionism and discriminatory practices towards foreign entities.
- *Finding common interests on foreign policy and security.* This topic includes the reinforcement of the Union's cooperation with China on foreign policy as to assure security in Central Asia, Asia-Pacific and EU's Eastern and Southern neighbours, counter terrorism, tackle proliferation and guarantee a cyberspace policy.
- *Global governance and working together in the multilateral context.* In this section, the Union includes the promotion of effective multilateralism, the respect for international law and universal values, and the global challenges and global public goods. The EU sets strongly for an international sphere where the UN and G20 offer rule-based platforms for the correct functioning of international relations.
- *A more joined-up approach towards China.* The Union states that the PRC requires a whole of EU approach, this means involving all from the Union's Institutions and bodies like to EEAS to the Member States.

iii) importance

As it can be seen, various of the topics like security, economy, multilateralism, technology, and rule-based order are once again included in document as it was the case in the previous one. The Union is aware of its need for a European Strategy towards China, and it incorporates in the text the most relevant issues.

For the study, two of the most important aspects are the following. Firstly, inclusion of the digital component as a major objective of the strategy. The digital economy and the new technologies are a reality and China is without a doubt immersed in a race to become the world's leading tech giant. The Union knows it, and it is also aware of the need of the Internal Market to incorporate these elements and allow the entering of digital services and products as to promote innovation, competition, and ultimately economic growth. However, the document does not refer to a specific digital policy towards China nor how the Union will act, only referring to the simple willingness to cooperate and outlining the importance for member States of having a united approach and trying to include the EU somehow when dealing with China. The second component of relevance is the mentioning of a more joined-up approach towards China, marking the inclusion of the EEAS in the strategy development towards the PRC. This is a clear example of the Union's conscious notion of China's power. The Commission alone cannot deal with the country, the entire Union and all the possible needed bodies and the Member States have to contribute on their parts to achieve this strategy.

iv) feasibility and future impact

Even if the document intends to present a strategy towards China, the reality is that it simply portrays a commitment by the Union to seek cooperating in certain areas. The feasibility of this text is therefore difficult to determine because beyond the pursuit of a Comprehensive Agreement on Investment, the rest of matters are just intentions without a clear policy or even strategy.

Notwithstanding, this does not mean that its future impact will be smooth, in fact it highlights a very relevant notion. The Union is actively seeking for a China strategy, and it includes the digital realm and its new objectives. This shows that the first step has already been taken, it is only a matter of time and the positive achieving of events before the EU is able to establish a more precise strategy with concrete courses of actions and obligations.

3.3. EU-China Strategic Outlook 2019

This document of 2019 is seen as a response to China's rapid development as an economic power, with its challenges and opportunities having strongly changed over the last years. At this point stands out the fact that the EU describes the PRC as a leading technological power, outlining the need to better tackle the digital component and its regulation with the country.

i) description and purpose

The last events have catapulted the PRC's involvement in several parts of the world, including Asia, Africa and Latin America. Moreover, it is already the second largest economy, and sooner or later it will become the next leading digital power.

Under this changes in the international context, the EU pursues to clearly define interest and principles, and balance reciprocal conditions that govern the economic relationship.

In addition, the text offers a more precise vision of the Union's changing idea of China. The relationship and cooperation seem to be cordial, and the PRC continues to be a very important partner, but in certain areas a balance has to be found when negotiating interests. As stated by the Commission, China is negotiation partner, an economic competitor pursuing technological leadership, and a systemic rival that promotes alternative models of political governance. This clearly notes the purpose of the Union's outlook, to inform China that it wants to continue the partnership but that it will not weaken in demanding the respect of the rule-based system and of European values.

ii) aims and objectives

The document includes five principal elements with the following aims and objectives:

Cooperating with China to support effective multilateralism and fight climate change. Once again, to engage in a rule-based international order, support effective multilateralism with the UN at the core, protect human rights, commit to the global sustainable development, the 2030 Agenda, and climate change.

- *Commitment to international peace, security, and sustainable economic development.* This topic includes the addressing of regional security challenges, China's maritime claims, promoting sustainable economic development in developing countries and respect good governance, and providing a clearer framework to the Union's strategy on Connecting Europe and Asia.
- *Achieving a more balanced and reciprocal trade and investment relationship.* The importance of constructing reciprocal market access and economic relationship, pushing negotiations for CAI, the bilateral Aviation Safety Agreement and on Geographical Indicators.
- *Strengthening the Union's competitiveness and ensuring a level playing field.* The Union sets for a guidance on a legal framework on participation of foreign bidder and goods in the EU market, build the EU Strategy on Artificial Intelligence, seek programmes for staying at the forefront of global research and innovation, and identifying how to properly deal with distortive effects of foreign state ownership and financing of foreign companies in the EU Internal Market.
- *Strengthening critical infrastructure security and the technological base.* In this section, 5G is viewed as the backbone for societies and economies. The text lists a series of digital initiatives and outlines the willingness to introduce a horizontal sanctions regime to counter cyber-attacks, a framework for screening foreign direct investment, and an export control of dual use goods.

iii) importance

In this outlook, more than proposing certain initiatives, the Union lists a series of matters that are important to analyse and develop in the near future when dealing with China. However, here as well no policy or set of activities are introduced to coordinate the relationship or establish a common action plan.

For the study, two elements are of strict importance. The first refers to the notion of outlining that the EU and Member States on their own cannot efficiently achieve any of their aims without being fully united. Moreover, Member States have a responsibility to guarantee consistency with EU law, values, and policies when dealing with China. The second is the mentioning of the digital component and China's aspiration to become a leading digital actor. This opens the inclusion of digital aims in the text that target new technologies and the proper and safe functioning of the Internal Market.

It is without a doubt that the document relates to the most pressing current issues of the EU regarding China and the values by which it wants to act, but it lacks in strength and consistency. From the statements in the document, it can be seen that the PRC is portrayed as a strong economic and digital power, and it seems that the Union is falling behind in its capacity to compete against it. Moreover, it is not without importance that the EU publicly brands the PRC both a negotiation partner and an economic competitor. This indicates two perceptions. On the one hand the interest to continue engaging in cooperation and partnership, and on the other hand a rising feeling of discomfort towards the practices of Beijing known for lacking transparency, state intervention, and the lack of reciprocity towards foreign enterprises seeking to operate in the Asian country.

iv) feasibility and future impact

The overall strategy does not actually introduce a policy framework but rather the vision towards China and the willingness to address specific matters at one point. Moreover, because the strategy introduces many different topics, the feasibility aspect of implementing all the objectives in case of being regulatory, would be difficult. It touches upon many matters but only specifies the interest to establish a common cooperation based on specific principles, not a policy strategy. This is also due to the notion that many of the topics are very broadly introduced, not dedicating a more precise evaluation on how they will be carried out. This might lead to a future impact that opens up a window of opportunity that sees the need to elaborate and implement more accurate strategies that address only one big agenda towards China, like the digital one. This is the major future impact that is in the very own interest of the Union, although it might take time and be subject to more years of uncertainty.

3.4. EU-China Comprehensive Agreement on Investment (CAI)

The 2016 Strategy on China already introduced the objective of elaborating a Comprehensive Agreement on Investment for implementing an ambitious approach to start new market opportunities. Nonetheless, despite the apparently mutual interest, the ultimate drafting of a text has not been achieved until this year.

i) description and purpose

This document pursues to establish an agreement between the European Union and the PRC in matters of investment. The Union is very much aware of China's strength in economic matters and its somehow very positive contribution for boosting the Internal Market. Therefore, it seems more advantageous to negotiate an agreement that controls the types of investment, the rules, and the reciprocal rights, rather than no deal at all.

Even if the PRC has been branded as a negotiation partner and an economic competitor, it is of interest for both to reach an agreement on investment, a matter that has been under dialogue for quite some time.

ii) aims and objectives

At the moment, both actors have concluded an agreement in principle on the investment agreement. The main aim is to regulate the investment under a level playing field with equal conditions, reciprocity of market access, and a legal framework.

The five objectives that have been touched in the text are the rebalancing of market access and the level playing field; the promotion of European values; security aspects regarding investment screening, 5G and the dual use regulation; the protection of the Internal market through the foreign subsidies instrument; and the openness to third countries via an international public procurement instrument.

iii) importance

The conclusion of an agreement in principle is a major step. Investment is a crucial aspect for the development of the Internal Market and the Union's prosperous economic development. This agreement is of importance for the study in the sense that even digital tools and technological components are now present in this field. The economy can no longer be seen without digital equipment, and this means that there is no alternative than having to address them when concluding an agreement of investment. Touching upon certain of these elements helps to rise the need among policymakers to actually conclude an agreement that deals with a digital agenda.

iv) feasibility and future impact

At the present time the text has undergone the steps of preparation, negotiation, and finally the reaching of an agreement in principle. The feasibility of the document seems to be positive, although it will take a long time until it is signed, the European Parliament confirms its consent, and it is then adopted and ratified by the corresponding parties.

Currently this process has become more complicated under Beijing's sanctions against European Union legislators and institutions as a response towards the sanctions of the EU, Britain, Canada, and the US against Chinese officials over human rights abuses in the Xinjiang region. As a consequence, the European Parliament has set the ratification process to a standstill, noting that the respect for European values will not be broken.

Notwithstanding, the future impact of the CAI can be of vital significance, as its success can boost the political need and disposition to open up further dialogues in concrete topics, leading to the commitment of introducing a debate for establishing other agreements.

Trend/impact on scenarios

Based on the previous study, the following trends of the EU's approach to China towards the four scenarios can be drawn (see Annex 3) that will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a considerable positive impact on its fulfilment. This is because the EU has not strongly bet on achieving a digital agreement but has focused more on remarking the PRC power in this realm. This leads to the Union having to accept its role of just serving as a game board for China's digital race.

For the *referee* scenario, this driver presents a strong positive impact. It is clear, that all the mentioned documents address, in one way or another, digital initiatives that aim at establishing standards and guiding principles that embody international rules and European values. Once again, the Brussels Effect is hereby consolidated.

For serving the *player* scenario, this driver has a weak negative effect. At the moment, none of the analysed documents indicates a commitment to further engage in a digital agenda that enables the Union to strengthen its position and compete as a major player. But the mere inclusion of digital aspects in these documents highlights their importance and can lead to future considerations as to include a more active role of the EU.

Finally, the approach towards China has as a weak positive impact on achieving a *hybrid* scenario with combinations of the three previous models.

4. Member States

It is clear that China is a strategic partner for the European Union and that for the benefit of all it has to seek mutual understanding and cooperation. This is clearly sought through the numerous documents that have been published over the years since official relations between both actors started in 1975. Nonetheless, even now the Union lacks a common consistent community strategy towards the PRC, not to mention in the digital realm, and Member States continue to have their own relations with the country. Fact that hampers the capacity of the Union to act with a single strong voice and be treated as an autonomous actor.

Characteristics

i) description and purpose

As it has been stated, besides certain provisions that fall under the scope of action of the Union, Member States continue to have their own foreign relations with the PRC, targeting social, cultural and innovation elements that do not necessarily portray the general vision of the EU. This has led to a set of actions by the Union concerning its Members States that can be appreciable in the previous analysed approaches of point 3. It consists of the active recommendation to incorporate EU Institutions in their dialogues with China and the remembrance of having to always comply with European values and principles.

As the EU-China Strategic Outlook suggests, the Union is starting to implement a tougher approach towards the Asian country that has soon skyrocketed into international power, with the purpose of finally achieving an equal playing field. However, this can only be reached if the Union approaches China as a whole, otherwise no Member State can manage it alone, even the strongest economic and innovative ones. In this regard, the major purpose for the Union is to bring on one boat all the different ideas.

ii) aims and objectives

The lack of cohesion regarding the relationship towards China makes it possible to differentiate three general positions with different aims and objectives.

The first group is headed by Europe's leading economies France and Germany, which are more proactive and aim to boost the Union's influence in the international arena. In this regard, they are more concerned of the possible geopolitical implications of a rising China, being considered, along with other States, as the major pushers for achieving a comprehensive agreement on investment with the PRC. Furthermore, they seek to strengthen the European industrial policies and the state's capacity to enable the objective of creating European champions. It can be said that these more competitive Members do not want to fall behind the shadow of China and loose economic power. In fact, this posture embodies the newly introduced description of the PRC as a 'negotiating partner, an economic competitor and a systemic rival'.

It can be considered that this statement is the new general direction that the von der Leyen Commission is implementing towards China. Moreover, certain Member States are even willing to go beyond and consolidate the Union as a major competitive power by pushing for the creation of European giants that can confront and compete in the international market under the Union's umbrella. Nonetheless, France and Germany do insist in the need to continue strengthening economic and political ties with China.

Regarding the technological aspect, no country has vetoed Huawei during the stand-off with the United States, and Germany, among many others, also continues to have the network installed in its telecommunications server. This shows that the States are aware of the potential of China's technology for implementing 5G and further new digital mechanisms, and that blocking them is not the solution. However, as these countries defend, if the Union incentives and contributes for the creation of European technology, then it can less and less rely on foreign providers.

The second position is mostly represented by Nordic countries that share the worries of the first but are reticent to increase state's interventionism in the economy to address competition with China. Instead of aiming at allowing that states can influence the creation of European champions, the objective is to continue a stricter approach towards China and reduce the economic and digital dependency towards the country. Harsher protectionist policies and security measures are seen as preferential.

The last position composed mostly by countries in the East and South of the Union with higher economic struggles, follow a different path. These are more open to continue stretching economic ties with China as they see more benefit in receiving their finances and investments than worrying about the economic governance models that Beijing implements.

This is better appreciated under the 16+1 cooperation framework between China and the CEEC, that has further divided the EU Member States in their vision towards China. Moreover, it is considered by scholars and analysts as a Beijing method of dividing and conquering, by avoiding to directly deal with EU Institutions and therefore dodging stricter mechanisms and procedures.

iii) importance

The internal division of the Union is a difficult aspect, nonetheless, there are several important aspects that need to be addressed.

On one side, France and Germany can be seen as leading actors that can push for opening an agenda that aims at implementing a true common strategy. Moreover, with their pursuit for European champions, they strongly result the need for innovation and modernisation in the digital field. This can be used as an advantage to push towards the Union as a whole.

On the other side, however, a major issue is the fact that Southern and Eastern States feel more separated from the general view towards China, and many of them are reticent regarding the French and German leadership inside the Union. This might trigger an internal polarisation of positions that makes it more and more difficult to reach a unique voice. It is very important to take into consideration all the voices and understand why certain countries are opting for one or another decision. This shows the need to first bring together the Member States and then move forward into seeking a common strategy, not the other way around. The Union cannot be autonomous if it does not embody the actions, statements, and visions implemented by its Member States.

iv) feasibility and future impact

The relevant but negative element to highlight is the fact that there is no consistent EU approach towards the PRC. However, this does not mean that there is no room for reaching a common voice, as the two first position groups have the same ideal, to stay strong against China. Even if both do not share the same specific approach, one is more interventionist and another is more protectionist, finding a middle ground is feasible. The more problematic element is to include the third position into the equation.

It will take time until the three major positions come to a consensus but it will be indispensable as to how it can impact the Union's path in the future. Depending on the ability to bring back all Member States under

one roof, and strengthen the Union's spirit among Member States, the EU can adopt not only a referee role but a player role as well in the international arena.

Trend/impact on scenarios

Based on the previous study, the following trends of the Member States positions can be drawn towards the four scenarios (see Annex 3), which will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a neutral impact on its fulfilment. This is because Member States' vision towards China in general terms does not negatively or positively affect this scenario.

For the *referee* scenario, this driver presents a considerable positive impact. Member States consider important that the Union sets standards and guiding principles that embody international rules and European values. Once again, the Brussels Effect is hereby consolidated.

For serving the *player* scenario, this driver has a weak negative effect. This is because not all Member States are willing to support a more competitive and autonomous Union, but a group of countries can soften this tendency and reach for a middle ground for the time being.

Finally, this driver has a weak positive impact on achieving a *hybrid* scenario with possible combinations of the three previous models. With the different position of Member States, finding a middle ground that allows for a unification of aims is more probable.

b) External drivers

Regarding driving forces coming from outside of the European Union a total of four elements can be identified. These will be studied and analysed below.

1. US-China Rivalry

When the Trump Administration took office in 2017, it marked the beginning of a new area of international relations. The most powerful democracy in the world welcomed a government that soon implemented its personal vision of foreign relations and how the United States would act from that moment on towards the rest of the world.

This direction was no other than Donald Trump's campaign slogan *America First*. According to this idea, it was time to put the prosperity of the country back to the centre of the political agenda and strengthen the country both internally and externally. It abandoned the notion of embodying the good Samaritan, helping others without receiving anything in return. External actions were welcomed as long as the US would see a high benefit when offering its contribution.

This new foreign approach has clashed with Beijing's turn in foreign policy under Xi Jinping who introduced the "China Dream" policy with the aim of modernizing the country and gain international influence.

Even if the relationship between both countries has always been turbulent and not without difficulty, the ambitions of these two leaders have only added fuel to the situation. Moreover, now under the Biden Presidency there is no strong indicator for a change beyond the instauration of a more correct diplomatic relationship.

Characteristics

i) description and purpose

The China-US rivalry is a temporary element in the international arena. Nonetheless, it shows a long-term tendency. Both countries follow the same purpose, to consolidate as the leading world power, and they will not stop until they have reached it.

This implies that in the power ranking one of them has to be a little bit below the other and vice versa. In this sense, if none of them abandons this purpose, the rivalry and competition between them will not stop either, conditioning the rest of state's decisions and actions.

Despite the countries' ideological disparities, current hostilities are driven by economic competition and Beijing's desire to expand and consolidate its power. This is strongly visible during these last years with the announcement of the China Standards 2035 strategy and an increase of investment in Africa and Latin America in telecommunication and digital infrastructure. In this regard, the economic component is strongly linked with the digital realm.

ii) aims and objectives

Regarding the US-China rivalry the following three positions of actors can be addressed with their aims and objectives.

The United States is the world's economic power that embodies the Western liberal order. The principal aim of the country is to continue its position of leadership and defend the democratic values that represent its nature. This is pursued through innovation, modernisation, and investment objectives in the principal spheres of influence like economy, military, industry, and technology.

The country is very much aware of China's jump into the digital race, and it is concerned about the impact of Chinese services and products operating in its market. One element is the worry over alleged espionage activities and predatory practices to gain information and collect classified data. This led in 2018 to the Trump Administration imposing tariffs on Chinese goods and including Huawei into the US Department of Commerce's Bureau of Industry and Security Entity List.

Nonetheless, it is not only a concern of national security, it also is a concern of losing power and influence. China has entered other international markets like the EU, where it is slowly gaining terrain in the 5G instalment, a step that is not well taken by Washington, which threatened the EU Member States with sanctions if it did not abandon Huawei's networks.

Lastly, these worries have not disappeared under the new presidency of Biden, and even if actions might take a more diplomatic approach, the US's overall aim will not change. Therefore, clashing with China's ambitions.

The Peoples Republic of China has undergone a significant new foreign approach with the general aim of modernising the country and becoming the central axis of the world. This is clearly seen under the launching of several strategies over the last years, starting with the One Belt one Road Initiative. The following have introduced a common element: technology, and digital tools. The Digital Silk Road, Made in China 2025 and China Standards 2035 all seek to implement new technologies in their activities. The country is conscious of the digital future and the economy, infrastructures, and goods and services cannot be imaged without digital tools.

This shows a clear objective of the PRC, to be the first in achieving digital leadership and spread as fast as possible into all corners of the world. Moreover, the final aim is to get rid of the 'fabric of the world' conception and promote the 'made in China' vision. Objective that has been accompanied by an increase of its GDP percentage allocated to investment in research, development, and innovation, which will be the highest in the world.

The European Union has been caught in the middle of disputes between the digital rivalry of both powers. Member States have been the target of sanctions that could have been more easily overcome if the EU had digital autonomy. But for the moment this is not the case, and the main aim of Member States has been to strategically avoid the reprimand and threat of the US, while not blocking Chinese networks.

The EU is conscious of the rivalry between both countries; however, it is in the interest of the Union to continue partnerships with both and not block one or another in the digital realm because, at the moment, it cannot afford to do so.

iii) importance

This reality has an essential importance for the Union, as it is put between a rock and a hard place. In other words, it has the opportunity to rethink what it wants and to decide which path to take. It is time for the EU to finally take its own future into its own hands, but a common approach is needed. An aspect that will take time and commitment.

For the moment, the reality is that the dominance in the digital arena is disputed between these two countries and that the Union continues to be a board game for their activities. It is dependent on both, and it is very difficult to compete against them as a player.

iv) feasibility and future impact

The question here is whether the rivalry can take a different turn than it had with the former Trump Presidency.

If under the Biden Presidency, the United States uses different tactics to stop the spread of China in the EU, then it can have a good future impact on foreign relations. Nonetheless, it seems more likely that the discrepancies will continue and that it is up to the Union to gain sovereignty and decide for itself how it wants to continue digital relations with them, as it will still be technologically dependent for a long time.

Trend/impact on scenarios

Based on the previous study, the following trends of US-China rivalry can be drawn towards the four scenarios (see Annex 3), which will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a very strong impact on its fulfilment. This is because both countries are at the moment leading in the technological and digital realm, and the lack of the Union's autonomy makes it more prone to stay as the playing field in their influence race.

For the *referee* scenario, this driver presents a weak positive impact. The dispute between the US and China leaves the Union in a weak competitive position, being the enforcement of standards and guiding principles that follow European values the only possible defensive action.

For serving the *player* scenario, this driver has a strong negative effect, as it indicates the leadership of China and the US and the Union's lacking capacity to become a player that competes in the digital realm.

Finally, US-China rivalry has a soft positive impact on achieving a *hybrid* scenario that allows for a combination of the three previous models.

2. China's Tech Giants

It is not without a reason that this Thesis addresses a digital strategy of the Union specifically towards the PRC. The country has already become the second most powerful world economy and it is heading to lead the digital race against the United States.

Moreover, the Union's change in paradigm under the Strategic Outlook 2019 notes that it is very conscious about the digital intentions of the Asian country. The future is digital and those who own, control, and set the rules for technologies will undoubtedly gain power and decision-making influence. It has become clear that strategic autonomy is closely linked with digital capacity.

Characteristics

i) description and purpose

China has been able to develop over the years a considerable number of digital companies and businesses that started with a domestic approach and that now reach all corners of the world. Adapting to the new reality, Beijing has rewritten its foreign strategy as to guarantee a stronger influence and consolidate its power in the digital domain.

The government has set its new purpose, to expand beyond its borders and move on from the 'fabric of the world' vision to a modern and competitive technological provider of goods and services made in China. This is clearly visible in its strategies of which the Digital Silk Road and China Standards 2035 stand out. Moreover,

the authorities do promote the progress of national entities and push for their internationalisation in their quest for expansion and information collection that gives the push for competition.

ii) aims and objectives

Beijing's aim is clear, to set up national digital champions that have a global reach and boost the country towards a dominant position. Just by targeting the national population, one of the largest in the world, their influence is already enormous due to the numbers, and reaching out to the rest of the world would imply a major dominance leading to a digital global leadership.

In this regard, six major China giants can be outlined that hold the biggest market value estimates, with all of them having an international reach and influence:

- *Xiaomi*. The firm is one of the top five smartphone sellers and the world's largest Internet-of-Things platform for consumer devices. Moreover, the Chinese Government has named among the national AI champions, companies that have the aim to advance in the study and implementation of AI development. The primal objective of Xiaomi is to focus on smart home devices. The company has entered the international market and owned worldwide reputation.
- *Huawei*. It is a multinational telecommunication and consumer electronics company serving as one of the largest smartphone manufacturers ahead of Apple but behind Samsung. Moreover, it is the world's top supplier of telecommunications. The entity has been targeted over espionage concerns and its dominance regarding 5G technology. In addition, it is focused on developing its own technologies for its devices.
- *ByteDance*. It is seen as one of the most valuable unicorn companies at the time, centring on social networking apps and consumer apps. Without a doubt, its star product is the social platform TikTok that has spread all over the globe and which has reached a major impact in the Western world and mostly the United States. Furthermore, it also runs many other social networking apps that expand beyond China.
- *Tencent*. It is a company providing for instant-messaging, e-payments, and games. One of the most popular services is the smartphone app WeChat, which is mainly known as the Chinese version of WhatsApp. However, the application is used by over one billion users and offers functions like instant messaging, social networking, and payments. Regarding game developing, it has contributed to establish Call of Duty or PUBG Mobile, which are widely spread in the US.
- *Alibaba*. It is an e-commerce firm and one of the most valuable tech companies in the world. Its services count with platforms like Taobao, Tmall, and Alibaba.com that go beyond China. It also includes online payment services and a strong investment in cloud computing.
- *Baidu*. Is the largest search engine in China and the second worldwide, widely known as 'Google of China'. It counts with a video streaming service like Netflix and has strongly invested in smart devices and cloud computing. Moreover, it leads China's industry of autonomous vehicles.

As it can be seen, China's tech champions do not only provide for digital services and goods but are actively engaged in studying, innovating, and creating new forms of products that incorporate new digital technologies. In addition, they are leaders not only in China and neighbouring territories but at a world-wide scale, entering societies and foreign markets all around the globe.

iii) importance

It is without a doubt that Beijing is taking every opportunity it has to lead in new high technologies, mostly artificial intelligence, telecommunications networks, cloud computing, e-commerce, autonomous cars, mobile payment systems, and smart cities. The main digital giants of China are important in the sense that beyond their global reach, they focus on providing and manufacturing services and products that at the end of the day are indispensable. This permits to create a dependency towards this companies until the EU has been able to create its own.

The most significant aspect of this driver is the high intervention of the Chinese Government towards national companies' development. Their potential has to be fully exploited and the diversification of activities is

crucial as to allow for digital unicorns that address different areas and, therefore, cover together the majority of the economic and social sector. In other words, it consists in assuring a wide variety of businesses that focus on specific actions, while committing to each one of them the investigation and advancement of certain new technologies. It can be said that China is trying to build an entire arsenal of national companies that allow for the proper functioning of a digital society.

This is a major geostrategic and political move that can lead to less digitally developed and modern states to grow a strong dependency towards China's providers.

iv) feasibility and future impact

For now, European tech giants like Spotify, Trivago, BlaBlaCar and Takeaway are mainly strong within the EU territory. Moreover, they address media streaming, vacation services, carpooling and food ordering, elements that even if convenient and desired are not strong businesses that can easily enter into foreign markets all over the world.

In the case of China's tech champions, it looks very feasible for the Asian country to lead the digital race and crown itself as the main provider of digital services and new high technologies. This has a strong future impact in the sense that it can either push the Union to strive for more innovation and involvement in its own entities or to focus on setting standards and making the Internal Market attractive towards the outside.

Trend/impact on scenarios

Based on the previous study, the following trends of China's tech giants can be drawn towards the four scenarios (see Annex 3), which will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a very strong impact on its fulfilment. This is because China's champions have an international reach in contrast to European ones. This closes the possibility of competition by the Union and forces it to remain the playing field for the China-US rivalry.

For the *referee* scenario, this driver presents a considerable positive impact. The advancement of Chinese entities has pushed the Union to seek the establishment of standards and guiding principles that follow European values.

For serving the *player* scenario, this driver has a considerable negative effect, as it indicates China's leadership and the Union's lacking capacity to become a player that competes in the digital realm.

Finally, China's tech giants have a soft positive impact on achieving a *hybrid* scenario that allows for a combination of the three previous models.

3. China's Strategy in the EU

The initiation of the EU-China relations and diplomatic recognition started in 1975, leading to a period of partnership that can be divided into four stages until today.

With the taking into office of President Xi Jinping, the Asian country declares its favourable stance towards the European integration process and demands a more transparent, fair, and trusted partnership. Since then, its interest regarding the opportunities of the European Internal Market have only grown, starting a strong approach towards the region.

Characteristics

i) description and purpose

Under the new government, China's purpose has become very ambitious. The state-led economy no longer sees as beneficial to concentrate solely on the domestic market, it is also very favourable to invest in foreign markets and commercialise products and services all over the world. Beijing has set the bar high, to consolidate as a global economic and digital leader.

For this purpose, the European Market, a non-digital autonomous territory lacking a common united voice in this realm, offers itself as a central territory to be targeted. Moreover, the different positions of Member

States regarding the relation with China, opens a window of opportunity for China to differently address the countries in its own benefit and avoid possible difficulties.

ii) aims and objectives

China's growing interest in the European region is emphasized when in 2016 it surpassed the United States and already became the main investor in Europe. Nonetheless, it employs a different approach and treatment towards the countries that need China's investment from those that do not. This shows the PRC's aim of seizing any opportunity it has to take the most profit out of the negotiations.

This approach is widely known under the concept of 'divide and conquer', targeting Member States on their own or within a specific aggrupation, outside of the EU's mechanisms, in order to more easily achieve influence. Furthermore, it has increased its bilateral relations and investments in the territory, with the objective of focalising its own interests.

Beijing's procedure consists of skirting supranational and even national legal regulations, while establishing a broad level of multilateral agreements and dialogues with the EU. When it sees that it has not been able to make further progress through this mechanism, it then tries to do so through other formal strategies like the new Silk Road or Digital China.

Another principal element is the Cooperation between China and the Central and Eastern European Countries composed by a total of 16 (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, Greece, Hungary, Latvia, North Macedonia, Montenegro, Poland, Romania, Serbia, Slovakia, and Slovenia). These countries have engaged in a cooperation framework with the Asian country as to promote and develop economic exchanges and encourage investments in the region. In this regard, Chinese investments have been reinforced with an extensive diplomatic agenda. More importantly, if this long-term strategy of cooperation results in China gaining an area of influence over the region, this could condition in its favour the policies dictated from Brussels.

iii) importance

There are three main elements to take into consideration. The first notion is the fact that China has set its eye on the European territory. This is positive in the sense that Chinese investment is good for the Union's territory, as long as all its Member States comply with the same guidelines. This leads to the second point. The PRC is conscious of the benefits it can achieve when directly targeting Member States on their own, without the Union being behind. Although, they cannot avoid the EU's values and principles, it is far easier to negotiate with only one state, than with Institutions that first have to put on the negotiation table 27 different countries. Leading to the third element, this strategy is further dividing the domestic positions of States towards the Asian country, making it more difficult to achieve a common strategy.

Lastly, the 16+1 platform is composed by Member States that are more critic towards countries like Germany and France that push for a more active approach towards China. It is very worrying that China can be able to influence that region, as it would translate into a weakening of political consensus within the European Union and even condition the policies from Brussels.

iv) feasibility and future impact

The main component to highlight when considering the future impact of this driver is the capacity of the Union to continue the relationship in the future. The PRC is very aware of what it wants to achieve, and it is time for the Union to ask itself the same question and find an answer as soon as possible.

For this to be possible, the Union has to turn the vision to its own territory and address the needs of its Eastern Member States, as to help them achieve its priorities. The EU is the home of 27 countries, and it has to assure the wellbeing of all, guaranteeing the prosperous development of the whole territory. Otherwise, if the Union is not capable of putting together all the different positions if China continues to influence certain territories it will only contribute to more fragmentation.

Even if the Union highlights in its documents the obligation of Member States to apply European values and urge them to include the Institutions in its negotiations, it is not enough. A clear and unique posture towards

China is needed. Even if the relationship with China is very important, it can only be beneficial if the EU acts as a single actor.

Trend/impact on scenarios

Based on the previous study, the following trends of China's strategy in the EU can be drawn towards the four scenarios (see Annex 3), which will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a strong positive impact on its fulfilment. This is because China has a strong approach towards the EU territory, which lacks digital autonomy and cohesion in its aims towards the digital giant. This leads to an interest of the Asian country to enter the European market and literally play in it to spread its influence.

China's strategy has a considerable positive trend towards the *referee* scenario. Even if the Union is still looking for a united voice in the digital realm, China's presence in the territory will undoubtedly push the Union to guarantee standards and guiding principles to protect its values and principles.

For serving the *player* scenario, this driver has a considerable negative impact, as it can drive Member States further apart and make it more difficult for the Union to develop a strategy that gives it the capacity to participate in the game.

Finally, COVID-19 has also a weak positive impact on assuring a *hybrid* scenario with combinations of the three previous models.

4. COVID-19

The pandemic caught the entire world by surprise. From one day to the other a considerable amount of the global population was not allowed to go outside and had no other option than to stay at home in isolation. This aspect triggered once more the importance of digital tools, which became indispensable for 'staying connected' to the outside world. Activities like studying, working, grocery shopping, social communication, or social entertainment that already had a digital component were now forced to only provide services and goods through technological tools, and its demand skyrocketed during the strongest periods of restrictions. Although it has been a temporary effect, it has opened the door for innovation that will guide the future of economies.

Characteristics

i) description and purpose

The ongoing crisis originated by the COVID-19 pandemic has highlighted more than ever that digital technology is a vital element for the present and an indispensable mechanism for the future. If the Union wants to pursue autonomy it has no other option than adjusting to digitalisation.

The overall purpose of the Union has been to tackle the economic and sanitary impact that the virus has caused in the European territory by notoriously introducing its Next Generation EU recovery plan. This temporary instrument will contribute to finance activities regarding work, climate, recovery and resilience, digital transition, research, and citizens' rights. In this sense, the EU has identified the relevance of implementing flexibility mechanisms as to guarantee a secure response capacity to tackle unforeseen needs and challenges.

ii) aims and objectives

The effects of the pandemic have shown that digital, economic, environmental, health and traditional security matters are indispensable to promote a country's sovereignty and autonomy towards other international actors.

Concerning the technological component, COVID-19 has undoubtedly strengthened the idea that the future will mainly be a digital one. Nowadays it is unconceivable to think about the social, economic, and political arena without the use of digital and technological tools. The private and professional spheres are all influenced by new technologies and companies' investment in innovation and research have strongly speeded-up its reach. Even it is still unknown how exactly these mechanisms will change and impact the

course of action national and international affairs; the reality is that full digitalisation is only a matter of time. This idea has not gone unnoticed by the Union and its budget for the Next Generation EU follows the main objective of supporting the modernisation of the current system. One of the elements that stands out is the inclusion of 'digital transition' as a major target, outlining the relevance of this field for the present and for the future.

Technical innovation and knowledge are the future, and they will draw the lines along which actors have to interact. In the case of the European Union, the virus has accentuated its asymmetrical nature of interdependence in science and technology, outlining its urgent need for common action.

iii) importance

The COVID-19 crisis has represented a call of attention for all international actors. More precisely, it has highlighted, more than ever, the leading role that technology plays in today's world and the importance it will have in shaping the future of societies. In the present time, the social, professional, economic, and political spheres are almost impossible to conceive without the use of digital means.

Furthermore, in the international arena, States submerge in a fierce race in order to secure its position as the first technological power. In this competition, the rivalry between the United States and China states out the most, which forces the rest of countries to position themselves with one side or another if they lack their own means and resources.

This serves as an incentive for the Union to be aware of two notions. On the one hand of the digital component and the relevance of continuing with the objective of a digital Europe that ultimately will design the Union's future. On the other hand, the need to address a common strategy towards China, which will become a major leader in technology due to its heavy investment in digitalisation, investment in research, development, and innovation.

iv) feasibility and future impact

If the European Union wants to achieve strategic autonomy, then it has to pursue a common digital agenda. COVID-19 can strengthen the feasibility of a possible digital strategy by bringing this matter back to the community dialogue as a result of its impact on the economy. The effects of the pandemic have put to the front the notion of a digital future for which societies and businesses need to be prepared.

The future impact of the virus will depend on the capacity of the Union to evolve in its role concerning the digital realm. It is clear that it can no longer serve as the board game of the United States and China, but it can either strengthen its position as a referee, try to be a player or opt for a combination. Now it has the capacity to decide what it wants and plan on how it can achieve it.

trend/impact on scenarios

Based on the previous study, the following trends of COVIDS'-19 impact can be drawn towards the four scenarios (see Annex 3), which will be studied more in detail in the second section of the analysis chapter.

Regarding *board game*, the driver has a soft positive impact on its fulfilment. This is because the effects of the pandemic might trigger a stronger competition between China and the US, with both countries disputing its influence on the EU territory that for the moment lacks in competition capacity.

The impact of Covid does have a considerable positive trend towards the *referee* scenario. Even if the Union is still looking for its voice in the digital realm, the reaffirming of a digital future strengthens the only clear vision that the EU has, namely, to guarantee standards and guiding principles that embody the European values. Once again, the Brussels Effect is hereby targeted.

For serving the *player* scenario, this driver has a considerable positive impact, as it can drive Member States and EU Institutions to consider the benefits from investing and developing digital services and products that will shape the future of European society.

Finally, COVID-19 has also a considerable positive impact on assuring a *hybrid* scenario with combinations of the three previous models.

12. Part II: Scenarios

Following the study of the eight internal and external drivers, its respective trends towards the four scenarios will be closer examined in the following section.

This part of the analysis will use Fulton's Model K handout for building scenarios (see Annex 5). Firstly, the thesis of the study will be presented, followed by the individual analysis of the scenarios under three characteristics. Lastly, in a separated section with a comparative analysis, the implications, considerations, and the predictions will be portrayed. The results will be summarised in Annex 6.

12.1. Thesis

The European Union needs to know how it wants to participate in the digital future. More precisely, it needs to think where it can be leading in this realm and what it is willing to do. The core sole of the Union are its values, principles, and democratic spirit, providing its citizens with a secure, safe, and prosperous territory.

The EU has now the opportunity to build a digital future that is fit for Europeans and that the Union itself is fit to provide for. Striving for strategic autonomy means to take a stronger action towards internal and external affairs, englobing all the necessary agendas beyond traditional security.

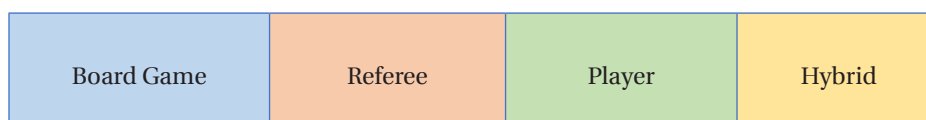
Having this in mind, the EU finds itself under the option of engaging in four possible scenarios concerning the digital sphere: *game board, referee, player, or hybrid*.

12.2. Scenarios

This Final Thesis works with the four possible scenarios that result from the combination of the previous studied internal and external drivers. Depending on the delivery of decisions from Member States and lastly the Union, the future engagement in digital and technological matters can take a more active or a more passive form.

Figure 4 depicts a table with the final composition of the future scenarios and figure 5 includes the three characteristics that will be employed to analyse them.

Figure 4. Scenarios



Source: Own elaboration

Figure 5. Analysis of Scenarios Through Characteristics

CHARACTERISTICS
description
analysis of drivers' trend on scenarios
advantages vs. difficulties

Source: Own elaboration

1. Game Board

Characteristics

i) description

The *game board* scenario implies that the Union's territory is used as a playing field by technology-leading actors, who compete in spreading their power and influence.

The EU zone, comprised by 27 Member States and hosting over 400 million citizens in a unique Internal Market, is seen as an important gold mine for tech champions and their respective States that wish to generate profit in a non-autonomous digital block.

At this point, there is no doubt that the future will be digital, and China will soon become the highest allocator of GDP on investment in innovation and research in new technologies, in order to be prepared for this new era and achieve the leading position.

This unequal strength and wealth of states has triggered disparities in the digital realm, with only a few countries in Asia and North America counting with international powerful tech giants that are revolutionising the market. This means that only a short number of actors will play, while the rest will serve as a game board for the moves and tricks of the players.

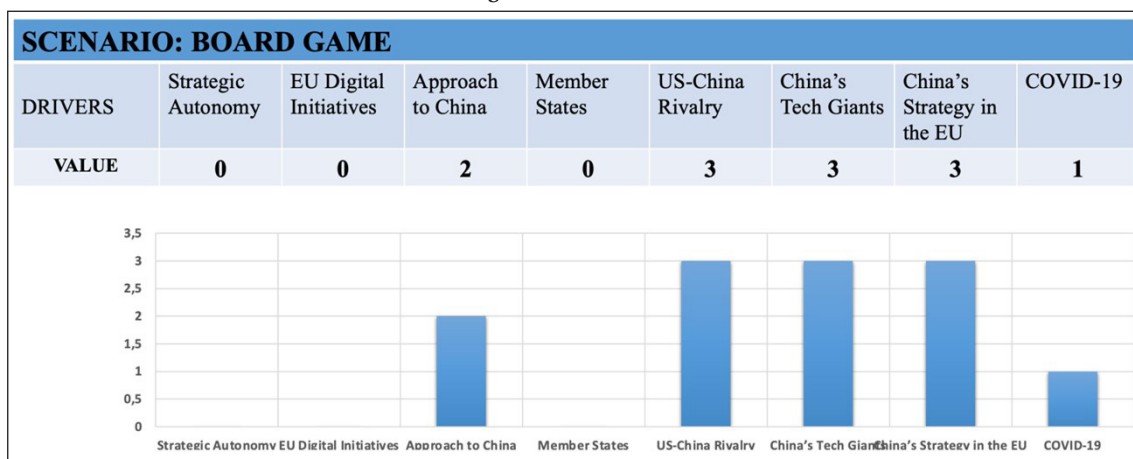
Even if the Union has introduced the aim of carrying out a process of modernisation of the economic, political, and social structures, including a green and digital transformation, it has not been able to implement a common digital strategy. Beyond the formulation of certain standards, EU Institutions have not been capable to push for an active role in financing, developing, and innovating in the fields of new technologies due to differences between the Member States.

This absence of union has put the EU in a weak position, which has seen its objective of achieving strategic autonomy wrecked and with a lacking internationally strong competitive digital market. As a consequence, China, aiming to spread its digital influence, will focus on expanding within the Union's territory. Following, the US will try to stop this and guarantee its own impact. All this leads to a situation in which the EU is left at the mercy of digital powers that use its territory as their board game.

ii) analysis of driver's trend on scenarios

The impact towards the *board game* scenario of the eight internal and external drivers, previously introduced in the first analysis section, are represented in Figure 6.

Figure 6. Board Game



Source: Own elaboration

The first thing to note is that no driver, either external or internal, has a negative influence on the *game board* scenario. This is because the analysed forces have a more positive impact on its fulfilment.

The second aspect to bear in mind is that it is the only case in which three drivers have a neutral effect on the scenario. *Strategic autonomy*, *EU digital initiatives* and *Member States* positions do not pose a positive or negative tendency towards the likeliness of the Union to serve as a playing field. This is because, despite the internal drivers promoting respectively the objective of strategic autonomy and the normative digital future objective that enforces the Brussels Effect, this does not affect the capacity of the Union to stop or promote a digital race within its territory. Moreover, the different postures of Member States regarding China do not influence this either.

The resting internal driver, the Union's *approach to China*, has a considerable positive effect (+2) for this scenario. This is because the last important reports relating to the relationship with the PRC have not included a digital strategy towards the state. The Union empathises that China is no longer a developing country and that it is heading towards a digital leadership. Nonetheless, it does not include a common objective of how to engage or confront the country, leaving more chance to the EU to serve as the playing field for China's digital race.

Moving on to the external drivers, it stands out that the *US-China rivalry*, *China's tech giants* and *China's strategy in the EU*, all strongly affect (+3) the realisation of this scenario. The first driver shows that the US and China are leading countries in the digital realm and their influence and power will make it difficult in the future for the Union to grow beyond its *board game* position. The second, is due to China's digital champions having an already international reach that are seizing the opportunity to spread in a non-autonomous digital territory. The third, notes that China is taking advantage of the division of postures within the EU, targeting specific countries that are interested in the foreign country's investment. Furthermore, China's strong approach enables it to expand in an attractive territory that cannot act with a united voice.

Lastly, *COVID-19* also shows a positive, but weak, trend (+1). The pandemic has reinforced the power of digital mechanisms, moreover, it has outlined the notion that the future will be digital and only the best players win the game. This can trigger a stronger competition between China and the US, with the EU caught in the middle.

iii) advantages vs. difficulties

Regarding the *board game* scenario there are a series of advantages and disadvantages for the European Union.

Even if in this specific case the advantages seem to be less favourable, they are not less important. This does not mean however that it is desirable for the EU. First of all, it would imply the easiest future scenario to be achieved because it accounts for actually not needing to take any action at all. This means that it is already taking place, being the last strong example of it the Huawei dispute of 2018 in which the US threatened European countries with sanctions if they did not abandon the Chinese networks.

Secondly, the Union does not have to change its direction. It can continue with its previous agenda and take things one step at a time, not having to rush into desperate political dialogue to reach a common ground between Member States. Accepting to be the playing field of others is not negative as long as the Union makes its values and norms to be respected.

Thirdly, it gives the EU the opportunity to sit down and think if it wants to continue like this or better change its condition. By letting others assume the digital leadership, it can observe where it can gain strength and be prepared before reaching the time it thinks it is ready to participate.

Lastly, this scenario does not imply the inevitable disintegration of the EU.

Concerning the disadvantageous aspects, these are more damaging for the prosperous and desired future of the EU. Firstly, it means that the Union has not been able to pursue its objective of strategic autonomy. Moreover, it is not autonomous in the digital realm, and it is dependent on the demands and timelines of leading actors.

As a second point, it represents a step backwards. Not being able to develop a common digital agenda that has a strategy towards China, the future leading actor in this field, leads to a weakening of the Union as an

international and regional actor. Furthermore, it seems that Member States are not concerned of the Union's future and its future wellbeing.

Thirdly, it would lead to a greater polarisation of Member States' positions towards China. This dispute will mostly confront those countries that demand a stronger autonomous European action with digital champions against those countries that are more interested in attracting Chinese investment.

Fourthly, the longer this scenario is in place, the more difficult it will become to change the situation. How the digital realm will evolve is unpredictable, but one thing is for sure, it will develop, and it will develop fast. Not keeping track of new technologies' research, innovation and investment will be very costly for the EU as a whole, losing market opportunities.

Lastly, it has a direct negative effect on European citizens who are losing opportunities of prosperity and growth in their professional and private lives.

2. Referee

Characteristics

i) description

The *referee* scenario implies that the Union continues to consolidate its position as a regulatory superpower, establishing digital and technological standards that influence the international market environment.

The European Union is widely known for its commitment to play by the rules of the game, dedicating its efforts to establish a consistent set of norms with the protection of citizens' rights and freedoms as the guiding principle.

This notion is described under the term of Brussels Effect that has allowed the EU to Europeanise important elements of international trade, shaping policy areas in consumer health, data privacy and protection, online hate speech or environmental protection, and now, on digital standards.

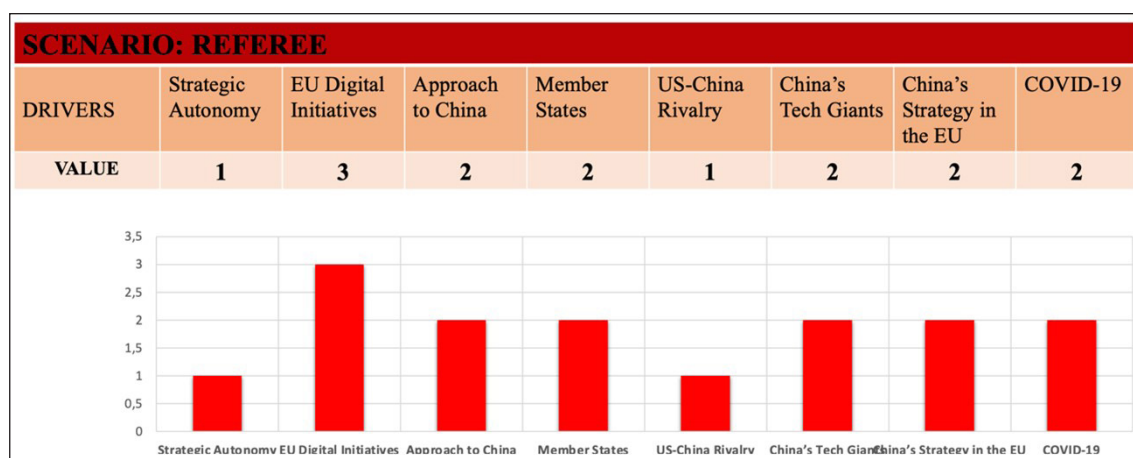
The international spread of the Union's legal methodology model has made it acquire a powerful position, enabling it to extend its normative influence long into the digital future.

Even if the EU is not a player in the digital race as such that holds technological power, it has come together to set the rules of the game. This gives the Union a powerful position in the sense that it decides and controls how foreign digital actors can operate on European territory, a major targeted market.

ii) analysis of driver's trend on scenarios

The impact towards the *referee* scenario of the eight internal and external drivers, previously introduced in the first analysis section, are represented in Figure 7.

Figure 7. Referee



Source: Own elaboration

The first thing to note is that no driver, either external or internal, has a negative influence on the *referee* scenario. This is because all the analysed forces have a positive impact on its fulfilment.

Regarding the internal drivers, these can be classified in three groups of positive strength from less to more impact. The first are the *strategic autonomy* and the *approach to China* (+1). On the one side, the objective of the EUGS 2016 that sets strategic autonomy as the guiding principle of the Union's action, contributes to the role of the Union in the digital realm, which is a major component to seek autonomy. This is more appreciable in the Union's normative power that has already been recognised in the international sphere. On the other side, the documents addressing the relationship towards China include digital initiatives that aim at establishing standards and principles that are set to serve as global models. However, the lack of a strategic digital agenda as such, that directs the Union makes them have a less of a stronger impact.

Secondly are the positions of *Member States* (+2). EU-States are favourable with the Union setting a normative structure for new technologies that is aimed at protecting citizens from predatory market practices.

The third strongest posture are the *EU digital initiatives* (+3). The timeline of the EU digital actions shows its major involvement in normative aspects. The Union considers itself as a normative power and it has applied this task in the digital realm. Furthermore, the *a Europe fit for the digital age* objective of the current Commission continues this path by introducing initiatives aiming at protecting the Internal Market, European citizen and European businesses under the implementation of the core EU values. This shows a clear aspect reinforcing and further developing the Brussels Effect.

Concerning the external drivers, only the *US-China rivalry* has a less strong positive impact (+1). The confrontation between the two digital actors leaves the Union in a weak competitive position with the only defensive action the enforcement of standards that lack a common digital strategy.

The resting drivers, *China's tech giants*, *China's strategy in the EU* and *COVID-19* have a considerable strong positive impact (+2). The advancement of China's digital champions in the EU territory, the divide and conquer approach implemented by China in the EU, and the Next Generation EU plan including a digital transition aim, strengthen the current normative approach of the EU in technologies. Although, the Union still has to develop a digital agenda, the confirmation of the fact that the future will be digital enhances the need of protecting European values.

iii) advantages vs. difficulties

Regarding the *referee* scenario there are a series of advantages and disadvantages for the European Union.

The advantages of this position imply, first of all, the consolidation of the Brussels' effect in the digital realm. The EU is already known as a normative power, but by expanding its regulatory influence into the whole technological world, it enters into a new level of power. Furthermore, the recognition of these norms by international actors, leads to a shape in business relations, giving the Union international prestige for its capacity to change and influence policy areas.

Secondly, as the future will be digital, the Union has converted itself in the editor of the rules of the game by which the world will follow. Even if it is not an active player, the EU assures its influence and participation by designing how technologies can affect the lives of citizens and how the technological market can operate. In other words, it controls the evolution of the EU itself and impacts that of other important territories.

Fourthly, it allows the Union to adopt a strong common position towards the outside world. The elaboration of normative digital rules puts Member States into one boat, defending the values and principles of the European Union. It strengthens the EU as an international actor.

Lastly, this scenario contributes to the achievement of strategic autonomy in the sense that it does not allow others to tell the EU how it has to behave, what it should do and what it should not.

Concerning the disadvantages that this scenario presents, the first to highlight is the notion that it is only a temporary solution. What will happen afterwards? The establishing of norms is a one-single action, the EU only has to target the specific activity, analyse it, and set the rule. It does not define the digital tool itself, only

its possible reach. This has a time-limited power once the norm has been introduced. The Union is working on already elaborated digital mechanisms, instead of developing ones.

Secondly, the recognition of being a powerful normative digital actor does not mean that the Union is an autonomous actor itself. Setting the rules does not make you a participant of the game, only an observer. Not being able to actively participate hinders the proper achievement of strategic autonomy because the EU is still dependant on digital aspects from foreign powers.

Lastly, the referee does not win the game. It only observes the match from an outside perspective but does not get to hold the trophy.

3. Player

Characteristics

i) description

The *player* scenario implies that the Union is participating as an active actor in the digital future.

The European Union has come together as a whole and decided to take the relevant steps as to set common objectives, actions, and purposes in new technologies.

Member States have realised the need for common action in the technological and digital realm, being conscious that none of them can act alone and actually succeed. In this sense, major compromise and consensus has been reach in order to lift the Union as a digital actor capable to compete in the international sphere.

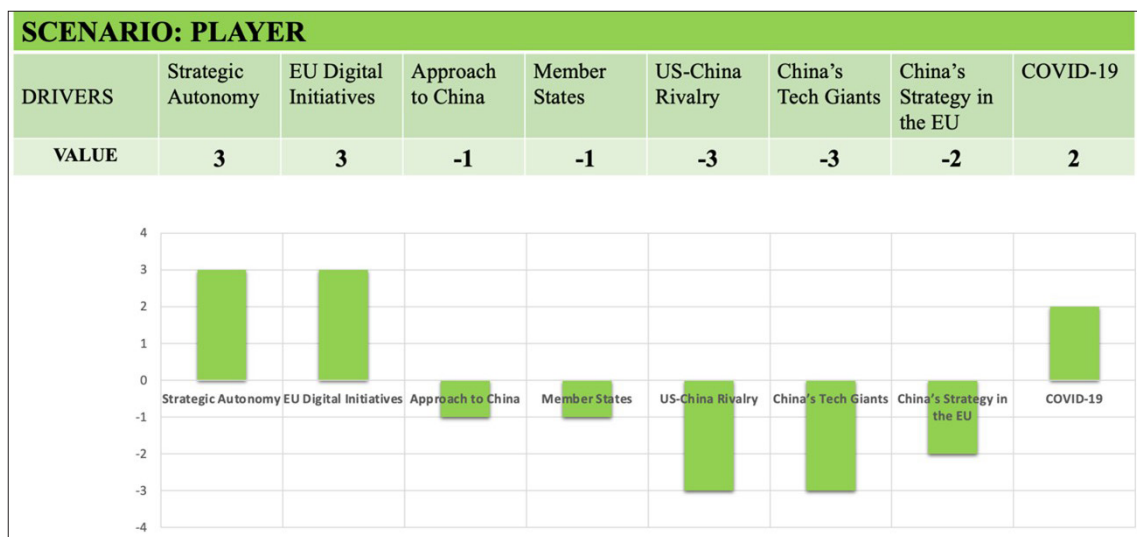
This united stand gives the EU a strong position, which supports objective of achieving strategic autonomy as a reachable reality. Moreover, the European territory will be on the same page when dealing with foreign intervention, like China’s interest in spreading its influence in the region.

It is an idyllic situation in which the EU has finally reached a powerful digital position.

ii) analysis of driver’s trend on scenarios

The impact towards the *player* scenario of the eight internal and external drivers, previously introduced in the first analysis section, are represented in Figure 8.

Figure 8. Player



Source: Own elaboration

The singular aspect of this table is that only two internal drivers have a weak negative trend, while three external drivers present a considerable, or more, negative impact on the fulfilment of the scenario. In fact, it is the only one with negative impacts.

Concerning the internal drivers, these can be divided in two groups, one positive and one negative. The first is composed by the *strategic autonomy* and the *EU digital initiatives* (+3). Autonomy implies to not only set standards and guidelines but having the capacity to act as well with one's own digital champions. In addition, if these standards are introduced properly, gaining the capacity to influence, and set global rules respected by other important technological powers gives the EU an active role.

The second group, *approach to China* and *Member States' position*, negatively influence this scenario (-1). None of the analysed documents indicates a commitment to further engage in a digital agenda that enables the Union to strengthen its position and compete as a major player. And not all Member States are positive to support a more competitive and autonomous Union, although supporters of it can soften this tendency.

Moving on to the external drivers, three pose a negative influence, *US-China rivalry*, *China's tech giants* (-3), and *China's strategy in the EU* (-2). All of them show the leadership of China and the US in the digital arena and the Union's lacking capacity to become a player that competes in the digital realm.

Lastly, *COVID-19* (+2) poses a considerable positive effect in the sense that it has alerted the Union of the need to consider the benefits from investing and developing digital services and products that will shape the future of European society.

iii) advantages vs. difficulties

Regarding the *player* scenario there are a series of advantages and disadvantages for the European Union.

The first major advantage is the fact that this scenario strongly contributes to achieving the much-desired objective of strategic autonomy. The digital agenda will become one of the most important fields in the future. Being autonomous in this realm means to not having to rely on others' mercy. In this sense, the Union will be strong as a whole, not needing to depend on foreign actors for its own development and deciding on its own how to design the future for Europeans.

Secondly, it positions the European Union as a strong actor with a united voice. The Union has been pushed to serve as a single actor in the digital realm, representing the Member States as a whole. This gives the Union a seat at the negotiation table in the international sphere. Moreover, it can participate in the design of the digital future and confront those which go against the wellbeing of Europeans.

Lastly, being an active player that engages in innovation, research, and investment of new technologies, contributes to the growth of the European economic strength. It allows for the proper modernisation of the Internal Market and the social sphere. Citizens are given the opportunity to enjoy a prosperous future within the EU, characterised by wellbeing.

Concerning the disadvantages, the most latent one is the fact that it is the most complex scenario to be achieved. It is very difficult to put together the different positions of 27 Member States into agreeing to convert the Union in a digital actor. In fact, countries would be reticent as how too much 'influence' and 'power' allow the EU to have in this realm, and therefore lose the opportunity to be a digital actor themselves.

Secondly, timely speaking, the EU cannot convert itself from one day to the other into an actor capable of competing against international superpowers.

Thirdly, it would suppose a completely new change in its foreign affairs relations. At the moment, the Union has been mostly perceived as a diplomatic actor, with now completely independent powers. Engaging in the digital race would mean to compete against the United States and China, being more challenging the last one. This implies to know what moves exactly to make, and the EU is new in this game.

Finally, by opening the possibility of becoming a digital actor, where is to draw the line of generating possible European tech giants? Can this lead to a weakening of the Internal Market's essence? The major problem would be to lose track of European values and standards.

4. Hybrid

Characteristics

i) description

The *hybrid* scenario implies that the Union presents a combination of the previous three scenarios: *board game*, *referee*, and *player* with a lower intensity in all cases.

The first possible combination is that the European Union maintains a *board game* and a *referee* position. In this regard, the Union continues to be an attractive playing field for digital leaders, but it enforces its normative power over digital standards. This allows for a protection of the European territory, while still allowing foreign investment and contribution. Moreover, the Brussels' effect is also reinforced.

The second possible combination is a mix of all three, *board game*, *referee*, and *player*. Here, Member States are eager to contribute for the Union's development and introduce aims, objectives and actions as to not only serve as the playing field and a rule-maker, but to participate in the game as well. The degree of the respective scenarios is reduced, but it represents a will to move together in the same direction.

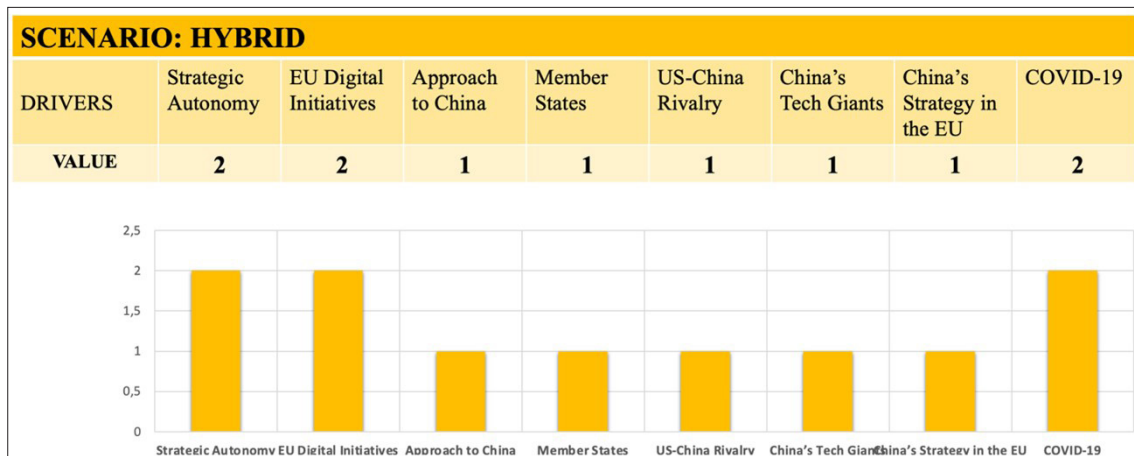
A third combination is the *referee* and *player* option. In this case, the Union is capable to develop and not serve as the playing field for the rest of actors. Moreover, instead of only assuming its normative strength it pushes to reinforce its influence by also participating in the game.

A last option is to serve as a *board game* and as a *player*. The Union decides to leave on one side its regulatory power and focus on serving as a playing field, attracting foreign investment, and participating in the game as well.

ii) analysis of driver's trend on scenarios

The impact towards the *hybrid* scenario of the eight internal and external drivers, previously introduced in the first analysis section, are represented in Figure 9.

Figure 9. Hybrid



Source: Own elaboration

The notorious element of this table is that all drivers have a positive effect on the scenario. In fact, it is a smooth influence, with the majority having a +1 trend, followed by +2. This shows that it is the scenario with the most stable impact by the drivers.

Of the internal drivers, *strategic autonomy* and the *EU digital initiatives* are the ones to pose a more positive effect, while of the external drivers it is the impact of *COVID-19*. This is because all three are more prone to allow for a combination of the three scenarios, *game board*, *referee*, and *player*. The influence of the resting drivers will set the type of combination. This means, as to what extend it will be a combination of the three or only of two scenarios.

iii) advantages vs. difficulties

Regarding the *hybrid* scenario there are a series of advantages and disadvantages for the European Union.

The first important advantage is the fact that it is the best option regarding the current reality. This means, on the one hand, that it is easier for the Union to achieve a combination because it does not imply to fully develop each of the individual scenarios, but to find a balance between them. This also allows Member States to still have different opinions and postures but engage at a certain degree in further development. On the other hand, the Union has already presented certain elements of the scenarios, being the *board game* and *referee* the most prominent ones. Further strengthening and comminating them will be a fast and achievable target.

The second advantage is the opportunity to carry out a step-by-step approach. Not jumping directly into one single role, allows the Union to discover its potential in different areas. The objective is not to fully convert into one solid position but rather engage in a variety of activities of the three scenarios that are indispensable for the EU to develop as an autonomous actor. Objectives need time to organise and to be fulfilled, engaging in different areas gives the chance to address all the components instead of just one part of it.

The third advantageous point is the possibility it offers to bring Member States back together. In order to be able for the Union to move on, certain chapters need to be closed first. Addressing the needs of Member States and taking their considerations into account is best accomplished by not forcing a strong position in the digital realm, but by introducing little aims and objectives. This generates a period of dialogue and reflection, time in which more pro-active Member States can show the doubtful, the importance of having a solid and active digital agenda.

Lastly, it strengthens the Union as a whole and opens a window of opportunity to engage into more action and heading towards strategic autonomy.

Concerning the disadvantages, the less favourable aspect of this scenario is that it is more difficult to find a balance of the combinations. How much *board game* is better with a *referee* position, and with a *player* role? It is a blurred line that does not allow to settle a specific agenda.

Secondly, engaging in several roles without committing to fully develop them, leads to a weak digital strategy. Decisions and objectives can be too vague and confusing, achieving therefore not a real strong policy direction.

Lastly, a *hybrid* scenario can lead to a two speed-Europe. A group of Member States would incline towards more action and commitment, while another group would support a slower and more cautious approach. These differences in ideas lead to differences in milestone settings, making it more difficult to move forward all together at the same pace.

12.3. Comparative Analysis

After having analysed the scenarios individually, this section will provide for a comparative study as to what are the considerations to bear in mind, what are the possible implications, and which are the predictions.

Figure 10 shows the totality of drivers' trends towards the four scenarios. When adding all the points, the scenario that has the more positive quantity is the *referee*, followed by *board game*, *hybrid*, and lastly with a negative figure, the *player* scenario. This does not represent a sequence of the preferred outcome for the EU, but the strength by which the drivers impact on the future possible outcomes.

Figure 10. Comparison

COMPARISON								
SCENARIO	DRIVERS							
	Strategic Autonomy	EU Digital Initiatives	Approach to China	Member States	US-China Rivalry	China's Tech Giants	China's Strategy in the EU	COVID-19
Board Game	0	0	2	0	3	3	3	1
Referee	1	3	2	2	1	2	2	2
Player	3	3	-1	-1	-3	-3	-2	2
Hybrid	2	2	1	1	1	1	1	2

RANGE OF VALUES		
Impact of drivers	Positive	+
	Negative	-
	Stronger	3
	Weaker	1
	Neutral	0

Source: Own elaboration

1. Considerations

Certain elements need to be addressed to identify the possible implications of the drivers on the fulfilment of the respective scenarios.

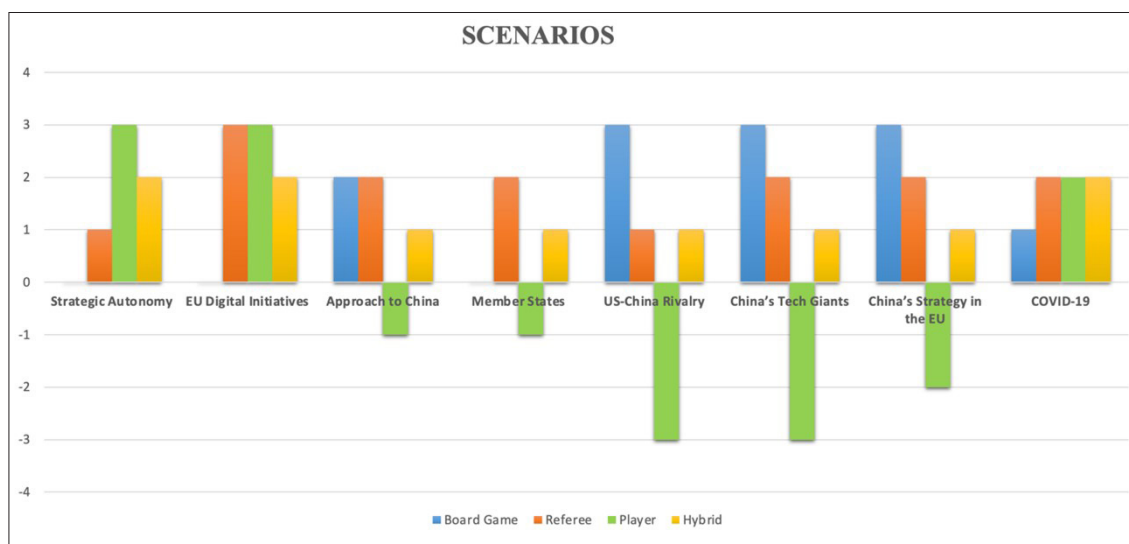
It is important to highlight that the positive influence on a scenario is achieved by what that driver stands for and how the Union has addressed it. This does not mean however, that the driver has been fully completed or that it is static. Having this in mind, the following table can be elaborated:

- *Strategic autonomy (1)*: introduced by EUGS 2016 and reaffirmed by European Institutions and authorities. However, there is still a need to fix a more precise strategy that includes the different agendas (digital, health, environmental ...)
- *EU digital initiatives (2)*: strongly supported by the EU institutions, lastly under the *a Europe fit for the digital age* priority introducing new technologies. Nonetheless, it has to be far more ambitious.
- *Approach to China (3)*: the EU has several documents discussing the relationship but there is no common strategy towards the Asian country. It has not been fully discussed to introduce it.
- *Member States (4)*: there is a lacking common posture towards China, involving different interests and ambitions. There has not been an express commitment to find a stronger united front.
- *US-China rivalry (5)*: is a reality that affects the European Union.
- *China's tech giants (6)*: have an international impact and influence, far beyond the capacity of European ones.
- *China's strategy in the EU (7)*: seeks to divide and conquer in a territory that lacks a common approach and autonomy.
- *COVID-19 (8)*: has shown the need to prepare for the digital future.

2. Implications

The previous considerations show the differences that can be drawn between the impact of internal and external drivers and what each group implies for the scenarios. It is crucial to note that one thing is the trend they have on the future, and another thing the probability of the driver itself to be accomplished.

Figure 11. Comparison of Driver's Trends on Scenarios



Source: Own elaboration

On the one hand, internal drivers represent indispensable factors for the EU: heading towards strategic autonomy, having a strong set of digital initiatives, establishing a united strategy on digital terms towards China, and enjoying a common position towards the country. Nonetheless, the analysed data shows more commitment to develop the first and second drivers, while the third and fourth note less intention and more division. Therefore, the first two will influence more the *player* and *hybrid* forms, with the other two influencing more the *referee* and *hybrid*.

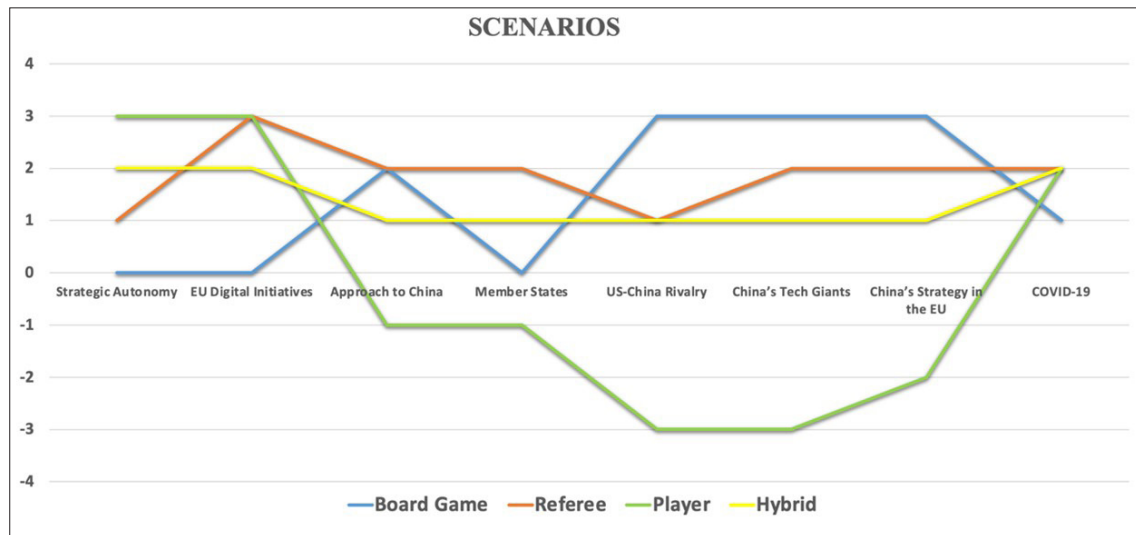
On the other hand, external drivers represent an exterior reality that is occurring and that marks the need for a common digital action by the Union. The first three reflect the Union's lack of autonomy and strength, influencing more the *board game* scenario, but also the *referee*, that implies a response of the Union to defend itself. The last one, *COVID-19*, has been the call for attention, influencing all scenarios.

The combination of all the drivers indicates that the *referee* scenario, has the strongest influence. This is because the normative power of the Union is already wide-spread, and it is not new in the digital realm. This leads to a higher probability for its consolidation, and what is known as the Brussels Effect. The second more influenced future is the *game board* position. The lacking digital strategy towards China, a diffuse position towards the country and the, at the moment, lacking autonomy, combined with the external events, punish the Union to serve as playing field for others advancement. The third most influenced scenario is the *hybrid* form, that pushes for a combination of the three, while the last position is given to the *player*. Building upon the previous facts, at the present time, the forces of the drivers do not allow for a consolidation of the Union to serve as an active digital actor that confronts China.

3. Predictions

Once the implications have been studied, the predictions and the feasibility of the results need to be measured.

Figure 12. Comparison of Scenarios



Source: Own elaboration

Taking into consideration the obtained information, the scenario that demonstrates a positive, linear, and constant trend is the *hybrid* form. This is because regarding the drivers, no scenario can be present on its own, elements of the others will somehow appear or are already in place (see figure 12).

The previous analysis indicates the following predictions of the *hybrid* combinations including the impact over time:

- *Board game + referee*. Highest probability. As it has been shown, the *referee* and the *board game* scenarios are the most influenced by drivers, being already present in a certain degree. In a short and medium term, however, there is a space of opportunity and willingness for the Union to continue strengthening its normative position in the digital realm.
- *Board game + referee + player*. Intermediate probability. In the medium term it is feasible to incorporate to the previous roles, little objectives and actions that allow the Union to assume a more active position. It does not imply however a strong autonomous position, but the beginning to start a new direction that can gain feasibility in the long term.
- *Board game + player*. Low probability. This combination offers a low likelihood because the Union itself is a normative power and abandoning this role would imply to abandon the mere essence of the EU.
- *Referee + player*. Very low probability. This scenario has the lowest chance in the sense that, the Union is not yet ready to advance in the short and medium term into a normative and active actor. The changes that first need to take place are too many and the EU finds itself in an early position as to strive towards this achievement.

In this regard, the first most likely scenario in the short and medium term is the *board game + referee* composition. It is difficult for the Union to completely abandon its position of playing field overnight. Nonetheless, consolidating its position of a normative actor in the digital realm, will mean a far higher influence capacity. Therefore, this combination presents a first step. Allowing the EU to settle standards and norms in new technologies can lead to a global impact. Furthermore, it gives the Union time to better organise what it wants and address the needs and thoughts of the different positions of Member States.

Afterwards, as a continuation of the previous, in the medium term the next possible scenario is the grouping of all the three. It implies the incorporation of elements that seek to put the EU in a player position, while the presence of the first two scenarios allows for a balance of ambitions and capabilities. It represents a second step towards the consolidation of a digital strategy and a common approach towards China. The Union has to strive to achieve this scenario and include, little by little, objectives, aims and goals towards digital action.

It does not mean that the EU will become a major actor in this field, but it represents the beginning of a new agenda in which the Union can find its role and competitive position. Furthermore, it permits to take things step by step, advancing more in certain technological areas than others depending on the circumstances. But ultimately, it opens the opportunity to seek strategic autonomy, more EU.

The third probable scenario, only in the long term and highly ambitious, is the *referee + player*. Over time, under the proper amount of solidarity between Member States and the enough desire to push the Union forward as an autonomous actor, the EU can overcome its position of playing field and acquire a normative and player role. It is the ultimately goal as to be able to reach strategic autonomy and strengthen the Union as an international powerful actor. This is the desired scenario for the long future, and the aim it has to strive for. Even if it will undoubtedly take a lot of time, if the EU wants to survive in the digital future and continue growing, it has no other option.

The *game board + player* combination is very unlikely in the sense that the EU is itself a normative power and it is not going to stop. Therefore, it is not considered in the study.

As it can be seen, the transition from one scenario to the other is not only dependent on time, but also on the capacity of the EU to reach a common ground and be able to move together. The future is Europe, a stronger Europe. It is about time that Member States take this into consideration and start building solidarity between them as to pursue a strong digital territory that is fit for European citizens and businesses and protects them from Chinese and further foreign intervention. Something that can only be achieved through a strong digital Europe.

13. Conclusions

The results of this final Thesis lead towards the establishment of the following conclusions.

1. The world crisis generated by the COVID-19 pandemic has brought to light, more than ever, the key role of technology in today's world. Furthermore, it has contributed to reaffirm the notion that the future will be digital.
2. This leads to the fact that those actors who are capable of consolidating a strong position in this realm will have a position of power and influence in the international sphere.
3. The People's Republic of China is very much aware of it and has started in the last years to investing heavily in digitalisation. Moreover, it will soon become the country with the highest percentage of GDP allocated to investment in research, development, and innovation of new technologies.
4. The race for technological leadership has strongly confronted the United States and the People's Republic of China, conditioning the rest of countries to position themselves with one or another actor if they lack their own digital means and resources.
5. The Union itself has been subject to external pressures, noting that its territory is being used as a playing field for the digital advancement of foreign more powerful international actors.
6. These events show that it is about time for the Union to review its approach towards China in the digital realm and decide whether it wants to serve as a *game board*, *referee*, *player* or a *hybrid* combination.
7. The analysed eight internal and external drivers, impact differently the probability of the four possible future scenarios.
8. The objective of strategic autonomy introduced in the EUGS 2016 and supported by European and political authorities is the leading principle of the Union's direction. Its proper achievement would imply to include a precise digital agenda, among other fields, that will lead the EU to serve as a strong autonomous actor. In this regard, it is indispensable that Member States come together for this purpose and agree on a common stand towards the relationship with China. Elements that for the moment are only feasible in the long term and under solidarity between all.

9. The digital initiatives of the Union are a clear example of its normative power. Furthermore, the protection of the individual and the respect for European values are at the core, embodying the essence and persona of the EU. The protection of data and information has been completed by the introduction of regulations for new technologies, more precisely under the new *a Europe fit for the digital age* priority. This indicates the EU strong approach towards standards, which under more ambitious steps can lead to a consolidation of the Brussels Effect and therefore, the strengthening of the Union.
10. The EU's approach towards China includes documents that discuss the relationship between both actors, including the mentioning of digital components, notwithstanding, no common European strategy has been established.
11. The Member States have a lacking common posture towards China, having different groups of interests and ambitions. This puts the Union in a weak position, not being strong and autonomous to defend a united stand.
12. The US-China rivalry, and the international reach of China's tech giants have a negative impact on the Union's capacity to compete, demonstrating its lacking strength in this realm.
13. China's strategy in the European Union indicates that the Asian country knows very well what it wants and what it needs to do in order to achieve it. By dividing and conquering it assures to influence the targeted countries. While it becomes evident that the EU has still to address what it wants to achieve.
14. COVID-19 has shown the need to prepare for the digital future and has triggered several aims to incentive digital transition in the European territory.
15. When adding all the points that the eight drivers have on each of the four scenarios, the future outcome that counts with the highest positive number is the *referee*, followed by *board game*, *hybrid*, and lastly with a negative figure, the *player* scenario. This does not represent however a sequence of the preferred outcome for the EU, but the strength by which the drivers impact on the future possible scenarios.
16. Regarding predictions, the only scenario that demonstrates a positive, linear, and constant trend is the *hybrid* form with a series of combinations. No scenario can be fully present on its own as elements of the others will somehow appear or are already in place.
17. In the short medium term, the highest probability is occupied by the *board game + referee* union. These two scenarios are the most influenced by drivers, being already present in a certain degree.
18. With an intermediate probability the composition of all, *board game + referee + player*, can be found. In the medium term it is possible to include little objectives and actions that allow the Union to assume a more active position, without yet becoming a full player.
19. The lowest probability is presented under the *referee + player* combination. Under the current circumstances, even in the long term it is difficult for the Union to introduce the changes that first need to take place as to achieve this outcome.
20. The Union has to consolidate over a period of time the *board game + referee* scenario, and then strive to achieve the combination of all three. In order for the Union to develop as an international actor, it has to consolidate strategic autonomy, and this is not possible without being a player in the digital realm.
21. The future of the Union depends on the commitment and solidarity of Member States to engage in the medium term in a more united, normative, and active scenario in the digital arena.
22. It is time for Europe to take its destiny into its own hands.

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Annexes

annex 1: elaboration of the simple scenario method

<p>Subject matter and objectives</p>	<p>The EU's digital strategy towards China</p> <ul style="list-style-type: none"> • The COVID-19 pandemic has brought to light, more than ever, the key role that technology plays every day in people's lives. Today, the social, professional, economic and political spheres are unconceivable without the use of digital tools. • In the international arena a harsh race for achieving technological power takes place. In this competition, the rivalry between the United States and China states out the most, which forces the rest of countries to position themselves with one side or another if they lack their own means and resources. • If the European Union wants to achieve its objectives of the Global Strategy 2016 (EUGS) and pursue strategic autonomy, then it cannot only conform itself with being the board game of the United States and China, the Union needs to develop a common strategy in the technological and digital realm, which, as important components in the economy, will be indispensable in the future. • Data shows that China will become the country with the highest percentage of GDP allocated to investment in research, development and innovation. • China's approaching to Europe and its strategies towards the EU highlight the need of the Union to review its own strategy towards the Asian country in these matters and start moving forward with a single voice in digital affairs. • As Margrethe Vestager (2020), outlines, the EU needs to know where it thinks it should be leading. That starts with the values, principles and the democratic spirit of Europe. In this sense it can build a digital future as fit for Europeans as the Union itself is for it. • The digital future is now more than ever a reality. 	
<p>List of strengths, factors and events</p>	<ul style="list-style-type: none"> • BRI, • Digital BRI, • Digital EU, • Made in China 2025, • China Standards 2035, • 5G, • Huawei, • Trump Administration, • US-China trade tariffs, • Divide and conquer, • Strategic autonomy, • EUGS 2016, • French-German partnership, • The Brussels's Effect, • Single Market, • PRC, • US, • European values and principles, • Normative approach, • EU-China a Strategic Outlook 2019, 	<ul style="list-style-type: none"> • Digitalisation, • Technological industrialization, • Data protection, • Technological giants, • COVID-19, • A Europe fit for the digital age, • Europe's digital decade, • Shaping Europe's digital future, • 21 new legislative and non-legislative initiatives, • Technology that works for the people, • A fair and competitive digital economy, • An open, democratic and sustainable society, • EU Member States, • European Commission, • Security, • EU-China 2020 Strategic Agenda for Cooperation, • 2016 Strategy on China.
<p>Groups</p>	<p>EU components</p>	<p>International components</p>
	<p>China components</p>	<p>Technological components</p>
<p>Drivers</p>	<p>Internal from within the EU</p>	<p>External from outside the EU</p>
<p>Scenarios</p>	<p>Game Board</p>	<p>Referee</p>
	<p>Player</p>	<p>Hybrid Combinations</p>

annex 2: driver's composition

INTERNAL DRIVERS	EXTERNAL DRIVERS
<p style="text-align: center;">Strategic autonomy</p> <ul style="list-style-type: none"> • EU Global Strategy 2016 • New types of Strategic Autonomy: <ul style="list-style-type: none"> ○ health, economic, digital, climate change, and traditional security 	<p style="text-align: center;">US-China rivalry</p> <ul style="list-style-type: none"> • Forcing to take sides • US security • China's investment
<p style="text-align: center;">EU digital initiatives</p> <ul style="list-style-type: none"> • Previous: 2016-2019 <ul style="list-style-type: none"> ○ European Data Portal, Digitising European Industry, GDPR, Building a European Data Economy, Towards a common European data space, Regulation on the free flow of non-personal data, Directive on open data and the re-use of public sector information, Cybersecurity Act (5G) • New: 2020-2024 <ul style="list-style-type: none"> ○ <u>Europe's Digital Decade</u> skills, secure and sustainable digital infrastructures, digital transformation of businesses, and digitalisation of public services ○ <u>Shaping Europe's Digital Future</u> 21 legislative and non-legislative initiatives: 7 adopted (Annex 4) 	<p style="text-align: center;">China's tech giants</p> <ul style="list-style-type: none"> • Xiaomi: smartphone seller, Internet-of-Things platform for consumer devices • Huawei: multinational telecoms and consumer electronics • ByteDance: social networking apps and consumer apps <ul style="list-style-type: none"> ○ TikTok • Tencent: instant-messaging, e-payments and games <ul style="list-style-type: none"> ○ WeChat • Alibaba: e-commerce firm <ul style="list-style-type: none"> ○ Taobao, Tmall, AliExpress <p><u>All have an international impact</u></p> <p style="text-align: center;">EU-Giants:</p> <ul style="list-style-type: none"> • Spotify: audio and media streaming provider • Trivago: internet-related services and products in the hotel, lodging and metasearch fields. • BlaBlaCar: online market place for carpooling • Takeaway.com (JustEat): online food ordering <p>Very low international impact or beyond European borders</p>
<p style="text-align: center;">Approach to china</p> <ul style="list-style-type: none"> • EU-China 2020 Strategic Agenda for Cooperation • 2016 Strategy on China • EU-China a Strategic Outlook 2019 • EU-China Comprehensive Agreement on Investment (CAI) 	<p style="text-align: center;">China's strategy in the eu</p> <ul style="list-style-type: none"> • Divide and conquer • DSR
<p style="text-align: center;">Member states</p> <ul style="list-style-type: none"> • Positions towards China • French-German partnership • 16+1 vs. 17+1 	<p style="text-align: center;">COVID-19</p> <ul style="list-style-type: none"> • Implications • Economic outlook

annex 3: scenario composition

Board Game	Referee	Player	Hybrid
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Drivers	Board Game	Referee	Player	Hybrid
Strategic Autonomy	n	+	+++	++
EU Digital Initiatives	n	+++	+++	++
Approach to China	++	++	-	+
Member States	n	++	-	+
US-China Rivalry	+++	+	---	+
China's Tech Giants	+++	++	---	+
China's Strategy in the EU	+++	++	--	+
COVID-19	+	++	++	++

Impact of drivers	Positive	+
	Negative	-
	Stronger	(+++)(---)
	Weaker	(+)(-)
	Neutral	n

annex 4: initiatives (cwp 2020)

No.	Policy objective	Initiatives
A Europe Fit for the Digital Age		
9.	Europe fit for the digital age	A Strategy for Europe - Fit for the Digital Age (non-legislative, Q1 2020); Digital Education Action Plan (update) (non-legislative, Q2 2020)
10.	A European approach to Artificial Intelligence	White Paper on Artificial Intelligence (non-legislative, Q1 2020); European Strategy for Data (non-legislative, Q1 2020); Follow-up to the White Paper on Artificial Intelligence, including on safety, liability, fundamental rights and data (legislative, incl. impact assessment, Article 114 TFEU, Q4 2020)
11.	Digital services	Digital Services Act (legislative, incl. impact assessment, Article 114 TFEU, Q4 2020)
12.	Increasing cybersecurity	Review of the Directive on security of network and information systems (NIS Directive) (legislative, incl. impact assessment, Article 114 TFEU, Q4 2020)
13.	Digital for consumers	Common chargers for mobile phones and similar devices (legislative, incl. impact assessment, Article 114 TFEU, Q3 2020); Review of the Roaming Regulation (legislative, incl. impact assessment, Article 114 TFEU, Q4 2020)
14.	A new industrial strategy for Europe	Industrial Strategy (non-legislative, Q1 2020); Single Market Barriers Report (non-legislative, Q1 2020); Single Market Enforcement Action Plan (non-legislative, Q1 2020); SME Strategy (non-legislative, Q1 2020); White Paper on an Instrument on Foreign Subsidies (non-legislative, Q2 2020)
15.	Aviation services package	Revision of airport charges (legislative, incl. impact assessment, Article 100(2) TFEU, Q4 2020); Revision of the provision of air services (legislative, incl. impact assessment, Article 100(2) TFEU, Q4 2020)
16.	Towards a European Research Area	Communication on the Future of Research and Innovation and the European Research Area (non-legislative, Q2 2020); Communication on Horizon Europe research and innovation missions (non-legislative, Q4 2020)
17.	Digital finance	Action Plan on FinTech including a Strategy on an Integrated EU Payments Market (non-legislative, Q3 2020); Proposal on Crypto Assets (legislative, incl. impact assessment, Article 114 TFEU, Q3 2020); Cross-sectoral financial services act on operational and cyber resilience (legislative, incl. impact assessment, Article 114 TFEU, Q3 2020)

No.	Title	Simplification objective / potential (short explanation of the REFIT objective of the revisions, and simplification potential for evaluations and fitness checks)
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A Europe fit for the Digital Age		
19.	Report from the Commission to the European Parliament and the Council on the Application of Regulation (EU) 910/2014 on electronic identification and trust services for electronic transactions in the internal market (eIDAS Regulation)	The Commission shall report on the application of Regulation (EU) 910/2014 to the European Parliament and the Council by 1 July 2020, as required by Article 49 of the Regulation. The report will assess to what extent the eIDAS framework remains fit for purpose delivering the intended outcomes, results and impacts and may identify possible further actions to improve regulatory performance. The Commission will conduct an evaluation in line with the Better Regulation guidelines, also involving a public and a targeted stakeholder consultation.
20.	Review of the Broadband Cost Reduction Directive (Directive 2014/61/EU)	The review aims to reduce unnecessary and costly administrative burden, which can significantly deter and delay network deployment. It aims to improve further the current measure by simplifying permits and procedures or by making the engineering works more agile by improving coordination with other infrastructures (roads, energy, etc.). This can represent an important opportunity for new legislation to reduce overall administrative burdens in the sector.
21.	Review of the Regulation on the internal market and cross-border e-commerce (Geo-Blocking)	The Commission shall report on the evaluation of this Regulation to the European Parliament, the Council and the European Economic and Social Committee by 23 March 2020, as required by Article 9 of the Regulation (EU) 302/2018. The Commission shall take into account the overall impact of the Regulation on the internal market and cross-border e-commerce, including, in particular, the potential additional administrative and financial burden for traders stemming from the existence of different applicable regulatory consumer contract law regimes.
22.	Revision for the Recommendation on the digitisation and online accessibility of cultural material and digital preservation (2011/711/EU)	The on-going evaluation assesses one of the main policy instruments on digitisation, online access and digital preservation of cultural heritage material with the objective to gather stakeholders views on a possible update to better reflect today's public needs in this area, and increase the potential of Europe's cultural heritage for the benefit of citizens. The revision will look at these aspects in line with current technology trends and the needs of the sector.
23.	Fitness check of 2012 State aid modernisation package, railways guidelines and short term export credit insurance	Due to the State aid modernisation, today, 96% of new implemented aid measures are in the hands of national authorities. This allows more rapid implementation by the Member States and the focus of State aid control being more "big on big things and small on small things". The ongoing fitness check seeks, among others, to assess to what extent the current regime has contributed to achieving a reduction of the administrative burden and whether there is a further potential for streamlining and simplifying State aid rules.
24.	Evaluation of the Vertical Block Exemption Regulation	The ongoing evaluation of the Vertical Block Exemption Regulation and Guidelines on Vertical Restraints seeks notably to assess to what extent the current regime has achieved its objective of providing a safe harbour for vertical agreements that are on balance efficiency enhancing, thus creating legal certainty and reduced compliance costs for stakeholders. This includes identifying areas in which the current regime may not properly reflect new market developments as well as possible gaps, which may have resulted in legal uncertainty, inconsistencies in the enforcement of the vertical rules in different EU Member States and therefore increased compliance costs for stakeholders.
25.	Evaluation of procedural and jurisdictional aspects of EU merger control	The ongoing evaluation focuses on simplification and cutting red tape where appropriate, streamlining of the referral system and other improvements of a technical nature. Moreover, in light of the recent debate on the effectiveness of the purely turnover-based jurisdictional thresholds of the EU Merger Regulation, the evaluation also seeks to assess whether these allow capturing all transactions, which can potentially have an impact in the internal market.
26.	Targeted modification of the General Block Exemption Regulation in relation to the EU funding programmes	The Commission aims at modifying the General Block Exemption Regulation in a targeted manner to accompany the next Multiannual Financial Framework. The proposal will ensure that national funding, from Member States' funds or from ESI Funds managed at national level, and centrally-managed EU funds can be combined seamlessly in the following areas: in financial products supported by the InvestEU Fund; RDI projects with a Seal of Excellence under H2020 or Horizon Europe, as well as co-funded projects and teaming actions under H2020 or Horizon Europe; and European Territorial Cooperation projects. (Q3 2020)

No.	Title	Simplification objective / potential (short explanation of the REFIT objective of the revisions, and simplification potential for evaluations and fitness checks)
27.	Consortia Block Exemption Regulation (exemption from Article 101 TFEU for certain types of cooperation agreements among container shipping operators)	The extension of the current Consortia Block Exemption Regulation for another four years will continue to simplify the analysis of consortia's compliance with competition rules, limit the dependency on external advice and reduce legal costs. (Q2 2020)
28.	Evaluation of the Low Voltage Directive 2014/35/EU	The low voltage directive (LVD) ensures that electrical equipment within certain voltage limits provides a high level of protection for European citizens, and benefits fully from the single market. It has been applicable since 20 April 2016. The purpose of this evaluation is to assess if the Directive is fit for purpose in terms of effectiveness, efficiency, relevance, coherence, EU added-value. On the basis of the conclusions on the performance of the Directive, the Commission will assess which next steps may be necessary to improve the performance of the Directive.
29.	Evaluation of the Postal Services Directive 97/67/EC	The postal sector is going through substantial changes due to digitalisation. The Postal Services Directive (97/67/EC) dates from 1997 and was revised in 2002 and 2008. The report on the application of the Directive will be accompanied by an evaluation to assess if the Directive is still fit for purpose and future-proof.
30.	Evaluation of the 'SME Definition'	The scope of this initiative is the Commission Recommendation concerning the definition of micro, small and medium-sized enterprises (2003/361/EC). It sets out the criteria to determine whether an enterprise is an SME (i.e. staff headcount, turnover/ balance sheet total and independence) and has been applied since 01/01/2005 when it replaced Recommendation 96/280/EC. As the Recommendation is referenced in over 100 EU legal acts covering a wide range of EU policies such as State Aid, a replacement will also have to address those references.
31.	Revision of the Machinery Directive 2006/42/EC	The initiative aims to: i) address the risks stemming from new technologies while allowing for technical progress, ii) simplify the requirements for documentation by allowing digital formats, hence to reduce administrative burden for economic operators, with an additional positive impact on environmental costs, iii) to improve the legal clarity of some major concepts and definitions in the current text of the Directive, iv) to ensure coherence with other Directives and Regulations for products and improve enforcement of the legislation through the alignment to the New Legislative Framework, v) reduce costs of transposition by converting the Directive into a Regulation. (legislative, incl. impact assessment, Article 114 TFEU, Q4 2020)
32.	Evaluation of EU legislation on design protection	The purpose of the evaluation is to analyse to what extent the current EU legislation on design protection has achieved its objectives in terms of efficiency, effectiveness, relevance, coherence and EU added-value, and it shall provide clear indications of the degree to which that legislation is still considered to be fit for purpose. The evaluation shall identify opportunities for streamlining registration procedures with a view to facilitating the simple uptake of design protection in the EU with potential reduction of costs and administrative burdens to the benefit of businesses, designers and SMEs.
33.	Evaluation of the Driving Licence Directive 2006/126/EC	The ex-post evaluation will assess how well the Directive has performed in improving road safety, facilitating free movement and reducing the possibility of fraud. It will also examine technical progress e.g. as regards vehicles and digitalisation (digital licences).

annex 5: fulton's analysis handouts

Model H – Part One – Identifying Drivers

H

Names: [Click here to enter names.](#)

Building Analysis: [Click to enter topic here.](#)
- Part One -

Thesis [Click here to enter text.](#)

Framing [Click here to enter text.](#)

Drivers	Driver	Trend
Driver 1:	Click here to enter text.	Click here to enter text.
Driver 2:	Click here to enter text.	Click here to enter text.
Driver 3:	Click here to enter text.	Click here to enter text.
Driver 4:	Click here to enter text.	Click here to enter text.

Other Points [Click here to enter text.](#)

Names: [Click here to enter names](#)

Building Analysis: [Click to enter topic here.](#)
- Part Two -

Thesis

Scenarios

Scenario 1: [Click or tap here to enter text.](#)

Scenario 2: [Click or tap here to enter text.](#)

Scenario 3: [Click or tap here to enter text.](#)

Wild Cards

Wild card 1: [Click or tap here to enter text.](#)

Wild card 2: [Click or tap here to enter text.](#)

Implications

Implication 1: [Click or tap here to enter text.](#)

Implication 2: [Click or tap here to enter text.](#)

Implication 3: [Click or tap here to enter text.](#)

Other Points

[Click or tap here to enter text.](#)

annex 6: analysis results

Name: Loreto Machés Blázquez										
Building Analysis: EU Digital Strategy Towards China - Part One -										
Thesis	<p>The effects of the COVID-19 crisis have foresighted the start of a new decade as a mainly digital one. Nowadays the social, economic and political spheres are unconceivable without the use of digital and technological tools. This idea has not gone unnoticed by the EU, which under the new von der Leyen Commission 2019-2024 has included the objective of “a Europe fit for the digital age”. Nonetheless, if the EU wants to pursue strategic autonomy, it has to address various agendas, including the digital one. In this sense, it has to decide where it wants to lead and how it wants to lead in this field: as a game board, a referee, a player or a combination of them. This decision will also depend on the strategy towards China and the country’s digital advancement.</p>									
Framing	<p>Data shows that the PRC will become the country with the highest percentage of GDP allocated to investment in research, development and innovation. Furthermore, during the last decade, Beijing has launched and even re-launched a number of strategies -BRI, DSR, made in China 2025 and China Standards 2035- that have strong links with digital components, mostly the three last ones. This shows that the Asian country has a clear view of what it wants and, at least, certain methods of how it wants to achieve it. This undoubtedly forces the Union to review its own strategy towards the Asian country in these matters and start moving forward with a single voice in digital affairs, which, as an important component of the economy, will be indispensable in the future.</p>									
Drivers	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;"></th> <th style="width: 30%; text-align: center;">Driver</th> <th style="width: 30%; text-align: center;">Trend</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Driver 1:</td> <td> <u>Strategic autonomy:</u> Introduced in the EUGS 2016 and supported by European and political authorities is the leading principle of the Union’s direction. It implies to act autonomously without having to rely on foreign actors. </td> <td style="vertical-align: top; text-align: center;"> Game board: 0 Referee: +1 Player: +3 Hybrid: +2 </td> </tr> <tr> <td style="vertical-align: top;">Driver 2:</td> <td> <u>EU Digital Initiatives:</u> An example of the normative power of the Union. The protection of the individual and the respect for European values are at the core. Now, the protection of data and information has been completed by the introduction of regulations for new technologies, more precisely under the new <i>a Europe fit for the digital age</i> priority. </td> <td style="vertical-align: top; text-align: center;"> Game board: 0 Referee: +3 Player: +3 Hybrid: +2 </td> </tr> </tbody> </table>		Driver	Trend	Driver 1:	<u>Strategic autonomy:</u> Introduced in the EUGS 2016 and supported by European and political authorities is the leading principle of the Union’s direction. It implies to act autonomously without having to rely on foreign actors.	Game board: 0 Referee: +1 Player: +3 Hybrid: +2	Driver 2:	<u>EU Digital Initiatives:</u> An example of the normative power of the Union. The protection of the individual and the respect for European values are at the core. Now, the protection of data and information has been completed by the introduction of regulations for new technologies, more precisely under the new <i>a Europe fit for the digital age</i> priority.	Game board: 0 Referee: +3 Player: +3 Hybrid: +2
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<p>Driver 3: <u>Approach to China:</u></p> <p>The documents discussing the relationship between both actors, mention digital components, but no common European strategy has been established.</p>	<p>Game board: +2 Referee: +2 Player: -1 Hybrid: +1</p>
<p>Driver 4: <u>Member States:</u></p> <p>Lacking common posture towards China, having different groups of interests and ambitions. This puts the Union in a weak position, not being strong and autonomous.</p>	<p>Game board: 0 Referee: +2 Player: -1 Hybrid: +1</p>
<p>Driver 5: <u>US-China Rivalry:</u></p> <p>Strongly affects the Union's capacity to act and puts it in a weak position, serving as the playing field for the countries' digital race.</p>	<p>Game board: +3 Referee: +1 Player: -3 Hybrid: +1</p>
<p>Driver 6: <u>China's Tech Giants:</u></p> <p>Having an international reach and expanding in the European market, highlight the lacking strength of the EU in this realm.</p>	<p>Game board: +3 Referee: +2 Player: -3 Hybrid: +1</p>
<p>Driver 7: <u>China's Strategy in the EU:</u></p> <p>The PRC knows very well what it wants and what it needs to do in order to achieve it. By dividing and conquering it assures to influence the targeted countries.</p>	<p>Game board: +3 Referee: +2 Player: -2 Hybrid: +1</p>
<p>Driver 8: <u>COVID-19:</u></p> <p>Has shown the need to prepare for the digital future and has triggered several aims to incentive digital transition in the European territory.</p>	<p>Game board: +1 Referee: +2 Player: +2 Hybrid: +2</p>

Building Analysis: EU Digital Strategy Towards China - Part Two -

Thesis

The European Union needs to know how it wants to participate in the digital future. More precisely, it needs to think where it can be leading in this realm and what it is willing to do. The core sole of the Union are its values, principles and democratic spirit, providing its citizens with a secure, safe and prosperous territory. The EU has now the opportunity to build a digital future that is fit for Europeans and that the Union itself is fit to provide for. Striving for strategic autonomy means to take a stronger action towards internal and external affairs, englobing all the necessary agendas beyond traditional security.

Scenarios

Scenario 1: BOARD GAME

The *game board* scenario implies that the Union's territory is used as a playing field by technology-leading actors, who compete in spreading their power and influence.

Scenario 2: REFEREE

The *referee* scenario implies that the Union continues to consolidate its position as a regulatory superpower, establishing digital and technological standards that influence the international market environment.

Scenario 3: PLAYER

The *player* scenario implies that the Union is participating as an active actor in the digital future.

Scenario 4 HYBRID

The *hybrid* scenario implies that the Union presents a combination of the previous three scenarios: *board game*, *referee* and *player* with a lower intensity in all cases. Combinations:

- *board game + referee*
 - *board game + referee + player*
 - *referee + player*
 - *board game + player*
-

Implications

Implication 1: The scenario that demonstrates a positive, linear and constant trend is the *hybrid* form. This is because regarding the drivers, no scenario can be present on its own, elements of the others will somehow appear or are already in place.

Implication 2: Predictions of the *hybrid* combinations:

- *Board game + referee*. Highest probability in the short and medium term.
 - *Board game + referee + player*. Intermediate probability in the medium term.
 - *Referee + player*. Very low probability in the long term.
 - *Board game + player*. Not considered as the EU is engaged in norms.
-

Implication 3: The transition from one scenario to the other is not only dependent on time, but also on the capacity of the EU to reach a common ground and be able to move together.

Other Points

The EU has to work together as to reach a *hybrid* combination of the *board game + referee + player* scenarios in the medium term. Nonetheless, in the long term, for the future, it has to strive towards the *referee + player* role. Even if it will undoubtedly take a lot of time, if the EU wants to survive in the digital future and continue growing, it has no other option.

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Resumen: La crisis mundial generada por la pandemia de la COVID-19 ha sacado a la luz, más que nunca, el importante papel que la tecnología desempeña cada día en la vida de las personas. Hoy en día, las esferas social, profesional, económica y política son casi imposibles de concebir sin el uso de los medios digitales. Así mismo, en el ámbito internacional, los Estados se sumergen en una feroz carrera para asegurar su posición como primera potencia tecnológica. En esta competición, la rivalidad entre Estados Unidos y China es la que más destaca, lo que obliga al resto de países a posicionarse con uno u otro bando si carecen de medios y recursos propios.

Si la Unión Europea quiere lograr sus objetivos de la Estrategia Global 2016 (EUGS) y perseguir la autonomía estratégica, entonces no se puede conformar con ser solo el tablero de juego de Estados Unidos y China. La Unión necesita desarrollar una estrategia común en el ámbito tecnológico y digital que, como componentes importantes en la economía, serán imprescindibles en el futuro.

Los últimos datos muestran que China ha invertido considerablemente en digitalización y se convertirá en el país con el mayor porcentaje del PIB destinado a la inversión en investigación, desarrollo e innovación. A su vez, el acercamiento de China a Europa y sus estrategias hacia la UE, muestran la clara necesidad de la Unión de revisar su propia estrategia hacia el país asiático en estos ámbitos y empezar a avanzar con una sola voz en los asuntos digitales.

Abstract: The world crisis generated by the COVID-19 pandemic has brought to light, more than ever, the key role that technology plays every day in people's lives. Nowadays the social, professional, economic and political spheres are almost impossible to conceive without the use of digital means. Furthermore, in the international arena, States submerge in a fierce race in order to secure its position as the first technological power. In this competition, the rivalry between the United States and China states out the most, which forces the rest of countries to position themselves with one side or another if they lack their own means and resources.

If the European Union wants to achieve its objectives of the Global Strategy 2016 (EUGS) and pursue strategic autonomy, then it cannot only conform itself with being the board game of the United States and China, the Union needs to develop a common strategy in the technological and digital realm, which, as important components in the economy, will be indispensable in the future.

The latest data shows that China has invested heavily in digitalisation and will become the country with the highest percentage of GDP allocated to investment in research, development and innovation. In addition, China's approaching to Europe and its strategies towards the EU highlight the need of the Union to review its own strategy towards the Asian country in these matters and start moving forward with a single voice in digital affairs.

Palabras clave: Unión Europea, República Popular China, soberanía digital, autonomía estratégica, 5G, nuevas tecnologías, estrategia digital, jugador, tablero de juego, árbitro, futuro digital, escenarios futuros.

Keywords: European Union, People's Republic of China, Digital Sovereignty, Strategic Autonomy, 5G, New Technologies, Digital Strategy, Player, Board Game, Referee, Digital Future, Future Scenarios.



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