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European Digital Sovereignty: The Role of EU Industrial Policy in the Context of Strategic Competition

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Policy Background

The rising geopolitical tensions, especially in the US-China relationship, are fundamentally reshaping international relations (Colibăşanu 2020). With the overlapping crises in the last decade, including the annexation of Crimea in 2014, the COVID-19 pandemic from 2020 to 2023, and the war in Ukraine started in 2022, tell a story of larger structural challenges in international relations. In this new configuration, technology plays an outstanding role in shaping the relationships between the main actors in international relations.

The tensions between the US and China have become one of the defining characteristics of contemporary international relations, affecting all sectors, from economic to military. The US-China tensions are transforming the technological sector into a site of geoeconomic contestation. As critical technologies have the potential to tilt the power dynamics, they have been elevated to the top political priorities globally. They matter for both economic and military reasons. On the one hand, they hold the promise of economies of scale, potentially ensuring fast growth. On the other hand, the new technologies are increasingly dual-use, playing an important role in complementing the performance of military capabilities.

In this context, the EU seeks to defend itself from the negative effects generated by geopolitical tensions (Weber 2025). The set of extraordinary measures is presented within the banner of "digital sovereignty" discourse (Adler□Nissen and Eggeling 2024). The narrative provides a framework to express its ambitions of shaping the digital ecosystem according to its values and interests (Csernatoni 2022). It enables the legitimising mechanisms for a type of "emergency politics" (White 2019) by legitimising extraordinary measures based on the logic of necessity in a context of shared threat perceptions (Kriesi 2025; Nicoli et al. 2024; Schimmelfennig 2024). Unilateral actions from European countries struggle to achieve effectiveness due to the complexity of the economic and political context. Thus, the rising external pressures are prompting greater EU-level action at both intergovernmental (Hammerschmid, Breaugh, and Rackwitz 2024) and supranational levels (Bora and Schramm 2023; Csernatoni 2022). However, the main challenge is that the EU Member States and the institutions present heterogeneous preferences, making collective action a difficult endeavour (Rone 2024).

Narratives like "digital sovereignty" act as coalition magnets by bringing together actors with potentially divergent preferences in support of an extraordinary measure in response to a shared perception of threat to a joint EU identity (Béland and Cox 2016; Seidl and Schmitz

2024). The Commission has an essential role in shaping this discourse and moving the EU policy towards activism and pragmatism. The new EU industrial policy provides an increasingly central role for the Commission in navigating the rising challenges (Haroche 2023). The supranational institution operates to protect and promote the development of the single market by supporting technological development, brokering industrial cooperation, reinterpreting the regulation to facilitate state aid, and addressing unfair foreign competition and influence in the EU. Far from a tendency towards federalism, the new EU industrial policy strengthens the multi-level governance model by better clarifying the roles and responsibilities at each cooperation level (Di Carlo and Schmitz 2023).

As a consequence of the geopolitical competition increasingly unfolding in the technological domain, industrial policy has moved to the forefront of policy debates, including in the EU context (Schmitz and Seidl 2023; Schneider 2023). In the last decade marked by a sequence of "polycrisis" (Zeitlin and Nicoli 2021), the EU industrial policy has expanded beyond purely economic efficiency and productivity, now encompassing strategic aspects, such as technological sovereignty and maintaining geopolitical relevance (Aggarwal and Reddie 2020; Babić, Dixon, and Liu 2022; McNamara 2024; Wigger 2019).

The EU seeks to shield itself from the negative effects of the tense US-China relationship through industrial policy measures, redefining the role of the public sector in shaping the markets and technological innovation. Industrial efficiency moved from a focus on pure economic competitiveness to political objectives, that some scholars label as post-liberal (Barrinha and Renard 2020; Davies and Gane 2021; McNamara 2024) or "productivism" (Rodrik 2023). This shift reflects a more fundamental convergence between economic and security (notably military) considerations, where the ability to control critical technologies (production capacity, supply chain security, and free from foreign interference) became a strategic matter for the governments (Haroche 2023).

Academic Context

The policy debates on digital sovereignty have also sparked the attention of the academic community, which has sought to understand its origins, meaning, and implications of the concept, particularly in the context of governance and EU policymaking (Adler□Nissen and Eggeling 2024; Barrinha and Christou 2022; Couture and Toupin 2019; Pohle, Nanni, and Santaniello 2024). Scholars have been preoccupied with exploring the origins of digital

sovereignty in the EU policymaking, examining how it evolved as a reaction to technological development and geopolitical shifts (Haroche 2023; Miller 2022; Monsees and Lambach 2022; Seidl and Schmitz 2024). While the concept existed in the political realm for decades in different regions worldwide (Couture and Toupin 2019), "digital sovereignty" has been adopted in the EU policy context only recently, as a reaction to growing external pressures. The concept gained scholarly attention as a reaction to the growing "talk" in the policy environment.

Scholars sought to establish ontological understandings of digital sovereignty. They have repeatedly labelled the concept as "ambiguous" (Palladino 2023) "buzzword" (Bellanova, Carrapico, and Duez 2022). Most of the recent research has been focused on discourses and policy measures in various European regions and countries. The European Union and its Member States have been the subject of significant scholarly interest (Adler☐Nissen and Eggeling 2024; Carver 2024; Floridi 2020; Monsees and Lambach 2022; Pizzul and Veneziano 2024). The main reason for this attention is the prominent use of the "digital sovereignty" concept in the political discourses, particularly the flexibility of employing it in practice (Pohle et al. 2024).

Research Gaps

Despite this growing attention to deconstruct the meaning of the concept, there are still gaps in understanding the digital sovereignty terminology (Perarnaud and Rossi 2024; Roberts 2024). Its inherent ambiguity and a growing politicisation of the digital policies continue to increase the complexity of this narrative. And with each study deconstructing the extent of the conceptual depth, more puzzles are discovered on the conceptual stretch, particularly in the EU policy context (Barrinha and Christou 2022; Broeders, Cristiano, and Kaminska 2023).

A large body of literature on digital sovereignty is concerned with the effects of digital sovereignty and shaping the policy change and institutional reform in the EU. Julia Carver (2024) identified several drivers that potentially shape the evolution of the digital sovereignty discourse in the EU, including geopolitical pressures, shifts in the EU governance suitability to the redefined context, legitimacy, and personal ambitions of the political leaders (Carver 2024). Carver suggested that future research could test the causality of these drivers. While the EU digital sovereignty discourse promotes an idea of EU-level action, the preferences across the EU are heterogeneous. Julia Rone (2024) proposed that we should focus on the process of national preference formation.

With most of the literature on digital sovereignty focusing on the discursive practice, there is a growing consensus on the need to clarify the dynamics that are shaping the debate, as well as positioning the importance of the discourse in shaping the relationships in digital governance in the EU and at the global level (Pohle et al. 2024). Several scholars call for more research attention to the coalitional potential of digital sovereignty discourse (Heermann 2024; Lambach and Oppermann 2022; Perarnaud and Rossi 2024; Wenzelburger and König 2024).

The concept of "digital sovereignty" is a process or a discursive practice which provide the EU policymakers with the framework to shape the worldviews. Thus, more research should extend attention to the normative dimension of digital sovereignty, shifting beyond traditional conceptions of governance (Coman, Crespy, and Schmidt 2020; Fabbrini 2024). Digital sovereignty rhetoric reflects a shift from the conception of monopoly over the coercive power to a notion of governance (Fabbrini 2024; Frunzeti and Achimescu 2019). This raises questions about the long-term effects of this discourse, particularly on the role of the Commission in shaping the policy change and institutional reform (McNamara 2024).

The technological development and the shifting geopolitical relations transform the notion of "national sovereignty". The growing challenges create a "sovereignty gap" (Kello 2017) or the "sovereignty games" (Adler-Nissen and Gammeltoft-Hansen 2008). There is a need to further explore the avenues of how state and non-state actors interact in new cooperative and competitive engagements (Costea 2023; Srivastava and Bullock 2024).

With the overlapping crises in the previous decade, there are questions regarding how they have produced policy changes and institutional reform in the EU (Börzel 2023; Bulmer and Joseph 2016; Coman et al. 2020; Kriesi 2025). More precisely, there are questions regarding the source of pressures for change, whether from the national level or rather a result of the lobbying process at the EU level (Heermann 2024; Schramm, Krotz, and De Witte 2022). This inquiry expands to analyse power dynamics in EU policymaking in the changing security landscape (Bora and Schramm 2023). It also calls to the need to understand the dynamics of new market-making and its impact on EU integration (Seidl and Schmitz 2024).

EU industrial policy has been the subject of many recent research articles, inquiring into the ideational shift towards "post-neoliberal" politics (Davies and Gane 2021; McNamara 2024; Seidl and Schmitz 2024; Wigger 2019). Kathleen R. McNamara (2024) published an article presenting various approaches for the future avenues of research on the new EU industrial policy, including the EU policymaking with the shift away from neoliberal attachments, politicisation, democratic legitimation, and the approach to geopolitical changes.

There is a need for further inquiries into the effect of a shift to market-making strategies on the EU's external engagement (Bauerle Danzman and Meunier 2024; Farrell and Newman 2021).

Research Design

This thesis aims to clarify the role of digital sovereignty discourse in the EU policymaking in a context of growing geopolitical challenges. More precisely, it seeks to answer the following research question: How did the evolving European norms and identities influenced the European Commission's approach to EU industrial policy change and institutional reform in response to shifting geopolitical dynamics between 2014 and 2024?

The secondary research questions are the following:

- What was the role of digital sovereignty discourse in shifting EU industrial policy from a normative to a geopolitical focus?
- Which actor was the most influential in shaping the EU industrial policy agenda in the digital area?

As the digital sovereignty discourse shapes the ideational imaginaries of desired futures, this thesis provides a deeper attention to the changing norms and collective identities within the EU. Digital sovereignty rhetoric is shaping a new idea of the EU identity, shifting from a normative market regulator to a strategic geopolitical actor. This discursive shift suggests more profound transformations in the EU's institutional structure and normative orientation. Central to this phenomenon is the role of external pressures, particularly the growing geopolitical tensions between the US and China, which this thesis demonstrates is among the most important drivers of EU integration in the last five years.

This thesis contributes to the European integration studies debates on the Commission's evolving role in policymaking, the shifts in ideational values that form the new EU industrial policy (Haroche 2023; McNamara 2024; Monsees and Lambach 2022; Seidl and Schmitz 2024; Wenzelburger and König 2024). It also builds on constructivist debates to understanding how ideas, norms, and identities shape policy change and institutional reform (Barrinha and Christou 2022; Béland and Cox 2016; Bellanova et al. 2022; Csernatoni 2022; Martins and Mawdsley 2021; Schmidt 2010). Moreover, the analysis builds on the thesis of EU integration in times of crises (Kriesi 2025; Schimmelfennig 2024). The analysis builds on the assumption that the digital sovereignty discourse is EU's response to growing threat perceptions from an uncertain international environment, particularly during the first von der Leyen Commission

(2019-2024). This thesis answers the research gaps on the process of legitimisation of interventionist EU industrial policy measures from the approach of "politics of last resort" (White 2019).

Table 1 *Overview of the Research Design*

Research design component	Description
Research questions	**Main research question:** How did the shifting European norms and identities influenced the European Commission's approach to EU industrial policy change and institutional reform in response to shifting geopolitical dynamics between 2014 and 2024? **The secondary research questions**: • What was the role of digital sovereignty discourse in shifting EU industrial policy from a normative to a geopolitical focus? • Which actor was the most influential in shaping the EU industrial policy agenda in the digital area?
Assumptions	• The convergence of crises in the past decade have pushed for more EU-level action based on the logic of efficiency. The incremental delegation of tasks at the supranational levels to address individual challenges have cumulative effects and set precedents for further delegation of authority. • Digital sovereignty has the quality of "rhetorical entrapment", facilitating consensus and coalition building. The narrative shapes a sense of collective identity under the threat of existential pressures, delegitimising partisan politics. This explains the aggregation of preferences on sensitive topics, such as industrial policy. • The lack of conceptual standardisation of the digital sovereignty rhetoric reflect a deliberate policy decision allowing the audience to interpret the discourse and project their interests. • The rising geopolitical tensions between the US and China are among the most important drivers that shifted the EU's identity from a norm setter to a geopolitical actor. • The resort to weaponisation of dependencies as a frequent practice in trade war between the US and China (after 2018) turned the EU industrial policy more assertive, legitimising more state intervention in shaping the market.
Theoretical framework	Discursive institutionalism; Neo-functionalism
Case study	EU industrial policy in critical technologies (artificial intelligence, semiconductors, and 5G)
Timeframe	2014 – 2024

Data	Official EU documents; Interviews with policy experts
Research methods	Interpretative approach and abductive reasoning; Qualitative document analysis and Qualitative discourse analysis; Discursive institutionalism: discourse network analysis

(Source: Author's elaboration)

Table 2 *Thesis Theoretical Framework*

Theoretical component	Theoretical choice to explain EU policymaking	Indicators
Analytic framework	Discursive institutionalism; Neofunctionalism	Discursive institutionalism: how the Commission constructs, communicates, and legitimises policy ideas Neofunctionalism: how past institutional arrangements, policy decisions, and crisis responses shape the development of digital sovereignty policies (policy continuity and change)
Empirical object of study	European Commission	How the Commission legitimises its role in shaping digital sovereignty The policymaking dynamics between the Commission and the Member States, as well as the legitimacy of the Commission in the role of coordinator reflected in the Member States' preferences alignement.
Theoretical argument	In control via dominant ideas, deliberation, and institutional means	The digital sovereignty principles reflected in communications and the transformation of ideas across time reflecting the prevailing perspectives. The role of ideas in driving policy change and EU integration. Involves the use of both quantifiable and unquantifiable indicators.
Bases of power	Ideational (symbolic) and institutional (pragmatic)	The strategic use of discourse and legislative powers of the Commission to expand its competences.
EU Crisis policymaking (2014-2024)	Politicisation and emergency politics	Urgency discourses and conceptual entrapment driving integration based on necessity and logic of efficiency. Strategic use of positive politicisation mechanisms (ideational and identitarian alignment), driving integration and providing legitimacy for EU policymaking.

(Source: Author's elaboration)

Academic contributions

This thesis makes several contributions to the literature. Firstly, the EU's adoption of a strategy towards autonomy is a response to the negative effects of its growing dependencies on strategic technologies. The shift towards autonomy reflects a defensive posture and the proactive attempt to reclaim technological control (Csernatoni 2022; Fratini 2024; Haroche 2024). This dependency not only reflects economic concerns. The critical dependency and vulnerability to supply chain disruptions also inhibit the EU's ability to act independently in the context of contestation of international relations and weaponisation of dependencies (Aggarwal and Reddie 2020; Farrell and Newman 2021). As such, critical technologies are a vivid example of convergence between economic and military issues (Bega 2023; Munteanu

2024). The shift towards more assertive industrial policy reflects a more profound ideational change in the EU policymaking. The bloc is moving from its traditional neoliberal attachments towards a more pragmatic model that enhances state intervention based on the logic of necessity to secure long-term resilience (Davies and Gane 2021; McNamara 2024; Wigger 2019). As such, the new strategy is not about isolationism or protectionism. Instead, it is about setting conditions for interdependence on the EU's terms (Lavery 2024; Pickel 2022).

Secondly, this thesis examines the "digital sovereignty" phenomenon as it unfolds in practice. The concept is challenging the traditional framing of "sovereignty" rooted in the state's monopoly over coercive power. Digital sovereignty represents a reconceptualization of the traditional "sovereign" idea, moving towards a governance approach, focusing on regulation and policy enforcement (Carstensen and Schmidt 2024; Dehousse 2016; Fabbrini 2024). Rather than conflicting with ideas of national sovereignty of the EU member states, the governance model within digital sovereignty reveals a complementary and layered framework. As such, digital sovereignty aligns with the post-traditional conception of governance, which is defined by the ability to shape rules, protect values, and safeguard interests in a rapidly developing digital landscape rather than exclusive control of a sovereign. The concept's inherent confusion is a feature that legitimises authority in the digital age by allowing the audience to project their expectations and interests, involuntarily contributing to an incomplete framework of ideas (Pascu and Chiriac 2021; Winkler 2023). By approaching sovereignty from this perspective, this thesis reconciles the conceptual ambiguity surrounding the concept of digital sovereignty. Its inherent confusion is a feature that legitimises authority in the digital age by allowing various actors to project their expectations and interests, involuntarily contributing to an incomplete framework of ideas.

Thirdly, adoption of digital sovereignty discourse has profound implications, shaping the EU's internal governance and foreign affairs approach. There are long-term consequences of declaring and institutionalising practices in digital sovereignty, particularly adopting a leader's identity in geopolitical engagements (Haroche 2023). It marks a shift in identity from a norm setter to a geopolitical actor that seeks to assert this position of a global technological leader. It also seeks to become an international reference for an ethical mode of technological governance, rooted in fundamental human rights and democratic rights. Therefore, this study shows that digital sovereignty rhetoric is not only about understanding the role of the EU as a norm setter. It also involves a shift in the governance and power dynamics in a renewed context of contestation and technological disruption.

Fourthly, this thesis shows a tendency towards supranationalism in contexts of crises. Moreover, the Commission's agenda-setting powers allowed to shape the discourse, succeeding to expand its role in providing a response to the growing challenges. The Member States entrusted the supranational institutions for several reasons, including its ability of ensuring long-term political commitments and for the geopolitical weight of a coordinated EU response. Instead of simply engaging in a quest to expand its own power, the Commission strategically tackles crises by setting precedents. It enhances efficiency by resolving collective action problems, which increases its legitimacy as a trusted coordinator for EU-level action (Dehousse 2016; Epstein and Rhodes 2016).

This is also connected with another contribution related to the study of the preference aggregation in times of crises (Kriesi 2025; Zeitlin and Nicoli 2021). The external pressures and the rhetorical entrapment of digital sovereignty facilitated consensus and coalition building (Béland and Cox 2016). Member States acknowledged that coordinating through the Commission, even when preferences were imperfectly aggregated, had the more potent effect in achieving strategic goals (Grande et al. 2016; Juncos and Vanhoonacker 2024).

Finally, this thesis reconciles the contradictions inherent to the EU discourse, which merges calls for autonomy and multilateralism (Balfour and Ülgen 2024; Grabbe and Zettelmeyer 2025). It shows that the EU's agency against growing international tensions is justified on security imperatives while keeping open the cooperative frameworks that traditionally characterised the EU's role in global governance, where interests allowed that.

Thesis Roadmap

This thesis is structured as follows. **The first part** sets the stage by critically engaging with the literature on digital sovereignty and its practical uses in contexts of crises and strategic competition between 2014 and 2024. **The first chapter** outlines the genealogy of the concept against the backdrop of emerging geopolitical tensions and defines its application within the context of EU policymaking. It seeks to structure the meanings of "digital sovereignty" as used in certain EU policy contexts to inform the process of identification in the subsequent analysis. It starts with an inquiry into the traditional concept of sovereignty and its contestability, looking at the main principles that underpin this idea. The aim of this analysis is to later understand the extension of traditional sovereignty in the digital context. I argue that it is difficult to explain the digital sovereignty phenomenon from the perspective of classic theories on sovereignty.

While some scholars tried to force a definition of the role of the state in this new context, the technological realities complicate this endeavour. For this reason, I argue that the post-traditional approach could account for the main aspects of the concept of "digital sovereignty". This understanding contextualises the state authority in a broader and more complex context marked by a "sovereignty gap", where the state increasingly shares its core prerogatives with private companies. In the EU context, the digital sovereignty discourse has two main functions. On the one hand, the performative nature of the concept legitimises public sector proactive measures (or even interventionist) political and legislative action in the digital area to address the perceived challenges. On the other hand, the normative role of the discourse is shaping meanings in the digital realm by projecting idealised identities and institutional constructs that abide by certain moral standards.

The second chapter deconstructs the international relations dynamics by engaging with scholarly interpretations of the concept "strategic confrontation" and the emerging debates on the "new cold war". The chapter presents these geopolitical narratives to inform the subsequent study by contextualising the emergence and the role of digital sovereignty. Particularly, the analysis of international relations dynamics will provide a basis to understand how the conflictual discourse between the US and China between 2014 and 2024, as well as the growing tensions globally, shape the EU's evolving identity and perception of external threats. Having a clearer overview of the structural factors that underpin the broader context will facilitate the understanding of the factors that favoured the emergence of digital sovereignty discourse and the mechanisms that shaped its meanings.

The third chapter explores the ideational dynamics of the EU industrial policy. This mapping will serve in the subsequent historical analysis of the EU industrial policy. It clarifies the ideational dynamics underpinning the EU's economic governance. The main ideational values that are developed in this chapter are Keynesianism, neoliberalism, and post-neoliberalism. Instead of engaging in a discussion on economic ideology, the chapter aims to define the interpretations I will use throughout the thesis. The objective is to provide a nuanced understanding of the EU's evolving phases and demonstrate the unique character of the new EU industrial policy.

The fourth chapter turns to the main European integration theories to identify a theoretical approach to explain the role of digital sovereignty discourse in EU policy change and institutional reform. Neofunctionalism and liberal intergovernmentalism offer specific insights into how discourse translates into concrete policy shifts by focusing on the mechanisms of change and power distribution among actors. While neofunctionalism explains the role of

digital sovereignty narrative in terms of institutional pressures to adopt a collective action to the rising challenges, liberal intergovernmentalism posits that the adoption of the digital sovereignty framework is a result of a deliberative process that shaped the outcomes based on strategic interests. Discursive institutionalism provides a third approach to understanding European integration that goes beyond the dyadic relationship between supranational and intergovernmental in understanding EU governance. It explains how digital sovereignty is framed by policymakers, legitimised through public debates, and institutionalised into organisational and legislative structures. Finally, this chapter presents the theoretical framework to understand the EU's actorness in a crisis context. I present my assumption that the "polycrisis" is a catalyst for the centralisation of EU governance.

The final chapter in the first part of the thesis summarises my theoretical choices that I employ in the analysis. I argue that classic theories tend to overemphasise this power struggle, whereas contemporary frameworks, like Schmidt's discursive institutionalism explanation on ideational power and deliberation, lack analytical depth. Understanding the role of digital sovereignty rhetoric in EU policymaking requires a theoretical approach that allows for the capture of the complexity of the phenomenon. I chose discursive institutionalism to identify the ideational evolution in the EU shaping its industrial policy approach. Additionally, I also chose to adopt the neofunctionalist framework to demonstrate the role of this narrative in driving more EU-level action, including by expanding the supranational competencies.

The second part outlines the methodological approach employed in this thesis. It develops the arguments for choosing this specific methodological toolkit for the research question. The chapter on the research design presents the main choices that will guide the analysis. It starts with deconstructing the research question and presents the rationale for the theoretical framework choice. The period of analysis is in the Jean-Claude Junker Commission and the first Ursula von der Leyen Commission (2014-2024). I have chosen to focus the analysis on this period because it is marked by a so-called "polycrisis" creating the conditions for "crisis policymaking". As I contend that the digital sovereignty discourse is a debate revolving around supranationalism, I have chosen the Commission as the main actor in the focus of the analysis. Understanding the impact of the digital sovereignty discourse in the EU policymaking process requires an interpretative approach in the analysis. Moreover, as my research experience demonstrated the difficulty of adopting a linear interpretive reasoning logic, I have chosen an abduction reasoning by constantly moving between theory and empirical data.

Based on a set of assumptions developed in the process of literature review, I have developed a strategy for data collection to feed the interpretive analysis. This thesis draws on data from official EU documents and interviews with policy practitioners. To analyse the data, I have used the discursive institutionalism methodology to differentiate between the substantive content and the interactive dimensions of the discourse (Schmidt 2010). I have also used the discourse network analysis (DNA) to trace the EU industrial policy change and institutional reform and to support the analysis of agency in this process. The combination of these two analytical approaches allows for the accounting of the ideational and the institutional impact of digital sovereignty.

The third part of this thesis explores the geopolitical tensions between the US and China, driving a more assertive industrial policy in the EU. The aim of **the first chapter** is to present the dominant perspectives on the US-China relationship between 2014 and 2024, with a focus on the technology sector. To have a good contextualisation for the analysis in the subsequent chapters, this analysis presents both the academic and policy perspectives on this phenomenon. Although the analytical framework of this thesis is grounded in constructivism, looking at the international context from a realist perspective helps contextualise the emergence of digital sovereignty discourse in the EU. This combined approach allowed for a complex understanding of the international context in the last decade by presenting complementary perspectives from the realist and constructivist thought. It allows for a more nuanced understanding by clarifying the material context in which the ideational transformations unfold.

The second chapter of this part explores in greater detail the political effects of the geopolitical shifts on the EU policy and institutional structure. It explores the emergence of digital sovereignty discourse within the broader international context. I deconstruct the discourses provided by the EU policymakers at the EU and national levels on digital sovereignty to clarify the main objectives and the means to achieve the EU's geopolitical ambitions. I show that digital sovereignty discourse has a rhetorical entrapment power that generates consensus and coalition building, including on issues of heterogeneous preferences.

The final part of this thesis explores the dynamics of the EU industrial policy from a policy discourse point of view. It starts with a **first chapter** tracing the EU industrial policy's ideational evolution from the period after the Second World War to the Juncker Commission (2014-2019). The analysis shows that Europe has previously gone through two ideational phases of industrial policy. The first was inspired by the Keynesian beliefs of public interventions for social and economic growth objectives. The 1980s represented a paradigm shift with the adoption of neoliberal principles rooted in ideas of the free market and

competition. The chapter concludes that Juncker's 2018 State of the Union Address marked a turning point in EU industrial policy, particularly regarding political declarations and public sector commitments for industrial development for strategic technologies.

The second chapter traces the policy goals in the new EU industrial policy after the Juncker speech. The digital sovereignty discourse reflects a transformation of the EU's industrial policy. The three main principles on which the new EU industrial policy rests are the ambitions for technological competitiveness, resilience, and aspirational goals. The aim of this analysis is to demonstrate the role of digital sovereignty discourse in shaping the new EU industrial policy.

The final chapter of this thesis summarises the shifts in the EU industrial policy during the first von der Leyen Commission (2019-2024), marked by rising geopolitical pressures. The aim of the analysis is to show how the framing of threats and vulnerabilities in the digital sovereignty discourse promotes a fertile environment for "politics of last resort", legitimising institutional and policy shifts. These factors lead to a consolidation of a unitary EU identity capable of formulating effective solutions. The chapter demonstrates that security issues generated support for EU-level action, including delegating tasks to the supranational institutions.

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