

EU-Trends in 2021

The following paper explores key developments in 2021 regarding the regional stability in Europe, the political integration of the European Union (EU) as well as its recovery, security and defence, and space policy. Moreover, it outlines possible shifts and risks considering the most significant trends in connection with the EU's role as a geopolitical actor in these areas.

Quo Vadis, geopolitical commission?

The European Commission President, Ursula von der Leyen, took office with the promise of building a true "geopolitical commission" a year ago. "A stronger Europe in the world" was her motto, while aiming to better coordinate the Union's foreign and security policy towards strengthening multilateralism based on European norms and standards. This year is, however, marked by comprehensive recovery plans following the Covid-19 virus outbreak and significant geopolitical ambitions in the field of foreign and security policy have not yet been signalled. In the second year of the Covid-19 virus outbreak, the EU will play a decisive role in shaping the far-reaching socio-economic developments on the old continent. The Covid-19 pandemic has enhanced the complexity of global affairs and the EU's geopolitical agenda has clearly suffered from the virus outbreak.

The greatest risk remains rooted in the increasing political, economic, and social destabilization following the Covid-19 crisis and the emergence of lines of fragmentation along competing geopolitical and geoeconomic interests of external actors in Europe. The deepening of these dividing lines might become the main reason hindering the EU from acting coherently in the arena of global affairs. The diverse agenda of interests and goals set predominantly by the USA, China, Russia, Turkey, etc. will give further rise to divisions among the European member states and institutions on geopolitical issues. The Franco-Italian clash of positions in the

Southern neighbourhood as well as the Franco-German-Eastern European clash of positions in the Eastern neighbourhood will continue posing obstacles to acting geopolitically in a coherent manner. In general, the EU will have little space to operate in the increasingly contested terrains in its direct neighbourhood to the South and East. Building ad hoc flexible coalitions with other regional actors will be decisive, as numerous upheavals, uncertainties, and crises will continue to nurture a volatile geopolitical environment with a direct negative impact on the regional stability and security in Europe. Consequently, the EU and its member states will have to carefully navigate through the complex relations between the USA, China, and Russia in 2021.

The presidential election in the USA is a glimmer of hope for Europe. Following the election of Joe Biden, the EU and its member states will again look to the USA in an anticipation of improving bilateral relations. With Joe Biden as President, there is an expectation that the USA will recommit to multilateralism and engage in building stronger transatlantic ties. However, the new Democratic President would also likely demand stronger commitment from his European allies in advancing joint foreign policy initiatives with Europe. Europe will therefore seek to further reduce its dependence on America in certain key areas and fields (e.g., security and defence industries and technologies, trade, etc.) and aim to achieve partial strategic autonomy. A self-determined security policy is the sine qua non for this accomplishment, however, it will remain an unattainable goal without a clear and strong political commitment to a European-style regional security order beyond the national interests of the member states. The first-ever elaboration of a strategic compass and the dialogue on four key areas – crisis management, resilience, capabilities, and partnerships constitute a process that is expected to bring about a positive change in 2021.

With respect to China, the first step in this direction has already been taken. Following the redefinition of the strategic partnership with Beijing by adding "systemic rival" and "economic competitor" to the previous designation of "cooperation partner", the signing of an investment deal with Beijing signalled a stronger European commitment. Josep Borrell, the EU's top diplomat, described the future bilateral relations as a "multi-layered relationship" that would be further characterized by the competition between China and the USA. The EU should therefore choose an alternative path to avoid being pushed even further between the two superpowers, while carefully navigating through their systemic rivalry. Finally, despite the current constraints, the European Commission will increasingly enhance its geoeconomic clout while putting the focus on the Indo-Pacific region. Brussels will seek to facilitate an upgrade of the strategic partnership with India and build stronger ties with like-minded countries in Asia such as ASEAN¹. Moreover, geopolitical gaps which are increasingly appearing in the Middle East, North Africa, and Eastern Europe will be occupied by powers such as Russia and Turkey and thus will be further intensifying the EU's conflictual relations with Moscow and Ankara. A common denominator will be achieving a convergence of European positions on Russia and Turkey.

Considering the debate on European strategic autonomy and the future security architecture, further steps will be made towards the division of roles and tasks within the EU. Following the Brexit deal, the successful functioning of the Franco-German engine of European integration will be decisive for the debate on strategic autonomy, which is why this trend will depend on the election of the new German Chancellor in 2021. A weakening Franco-German axis will not only slow down common security and defence initiatives but will also negatively impact the debate on strategic autonomy.

Reaching the aspired goal of becoming a geopolitical actor would require at least a partial strategic autonomy in European security policy and multi-fora alliances in global affairs. For Europe to become a geopolitical player instead of serving as a playing field for the systemic rivalry between the USA and China, it is necessary to assert European interests, values, and norms internally and to project them externally by forging alliances with like-minded partners. Even though the goal of strategic autonomy is not achievable in the short term, an actual operational and political autonomy coupled with a strengthening of the European industry sectors and a diversification of global supply chains will likely take place starting with this year. A European single market for defence equipment will certainly be another positive signal in the right direction, together with the overall increase of defence spending. Positive game changers would be the improvement of the transatlantic relations as well as the return to normality in the bilateral relationship between Washington and Beijing, the intensification of the European defence initiatives such as PESCO² as well as the strengthening of the European pillar within NATO³. Conversely, negative game changers will be linked to an increase of the hotspots in the direct European neighbourhood, a worsening of the relationship between the USA and China as well as military tensions along the peripheries of Europe, such as the war between Armenia and Azerbaijan in Nagorno-Karabakh⁴ in 2020.

European Integration – the Covid-19 legacy and ambitious future plans

The Covid-19 crisis and its multifaceted implications on the health and medical sector, the socio-political balance, as well as the economy and single market have strikingly overshadowed all other developments and challenges the European Union has faced in 2020. Practically all policy areas of the EU and its member states have been directly or indirectly affected and shaped by the virus, since dealing with its outbreak consumed large portions of Europe's political capacity, while simultaneously limiting the scope of government-

tal and European decision-making. Thus, the majority of anticipated measures to promote European integration had to be put on hold, as the pandemic unambiguously gave rise to the defining forces of the Union: national authority vs. European cohesion. The need to introduce national medical, political, economic, and social Covid-19 coping mechanisms pushed many governments to unprecedented limits, exposed their self-interests, and (re)enforced some nationalistic tendencies. However, whilst consequently weakening European solidarity, the Covid-19 crisis has also made it abundantly clear that no member state can successfully and sufficiently face such challenging times alone.

The full extent of the crisis' various effects and damages is yet to be determined and can most likely not be adequately assessed until the second half of 2021 at the earliest. Nonetheless, the new Portuguese Presidency of the Council of the European Union has ambitiously signalled to start implementing the recovery program as pronounced in their Presidency's motto: *Time to deliver: a fair, green, digital recovery*. Following this slogan, Lisbon has formulated three key priorities: endorsing a European recovery that is leveraged by the green and digital transition, introducing the Social Pillar as the central aspect for safeguarding a fair transition, and enhancing the strategic autonomy of the EU.⁵ Building on the recovery instruments outlined by the previous German Presidency and on the extraordinary €1.8 trillion budget-and-recovery package that EU leaders adopted in mid-December, the Portuguese Presidency is thus expected to initiate the next phase by focussing on implementing first measures.⁶ Widespread vaccination programmes, the desired silver bullet to end the Covid-19 crisis, pursued by the EU through its vaccination strategy and negotiations with Big Pharma, resemble yet another potential seed of discord. Strong criticism has emerged from various member states, Germany amongst others, that the EU has purchased too little BioNTech/Pfizer vaccines, despite the fact that the EU Commission has secured a total of more than 2 billion doses from seven different producers.⁷ Whilst countries like Hungary,

Italy, Poland, and Germany put pressure on the EU to speed up the vaccination procedure, European stakeholders and the European People's Party are defending the Union's vaccination strategy by stressing that organising the vaccine procurement jointly was the right decision and a strong sign of solidarity.⁸ It is yet to be seen whether the current blame game will spread more dissatisfaction and disunity in the upcoming months. Against this background and the lessons learned from the health crisis, demands to better coordinate comprehensive medical measures through setting up a European public health institution are increasing, a trend which might shape the Covid-19 legacy in 2021.

Apart from the all-dominating Covid-19 crisis, a positive sign of EU integration unfolded in March 2020, as the European Council gave the green light to opening accession negotiations with Albania and North Macedonia. The decision was made after overcoming fierce resistance particularly from France, blocking the process in the past due to its demands to reform the accession process. The long-awaited enlargement package was finally released in October, after being delayed by Commissioner Varhelyi, representing a new change to revive the stalled enlargement process with the Western Balkan countries.⁹ However, the start of the membership talks and agreement on the negotiation framework were blocked yet again by Bulgaria in November, due to populistically charged disputes over North Macedonia's history and language. The upcoming parliament elections in Bulgaria in March 2021 and a potential change in leadership might resolve the continuous enlargement stalemate, enabling kicking off the negotiations and providing a fresh impetus for European integration.

Regional Stability in Europe

Europe's regional stability has been heavily put to the test recently by undergoing challenging times, a trend which is most likely to continue in 2021. Given the complex crises that the EU is currently facing, brought on by the global Covid-19 pandemic, it is implausible that the EU will

get back to its status quo ante soon. The latter is highlighted by the fact that Covid-19 exacerbated the existing problems that the Union was already dealing with, like the polarization of society, disrespect of the EU values, and rising distrust in the governments of the member states.

Europe's regional stability is endangered by diverse and at the same time major challenges. This includes the possibility of terrorist attacks, the weakened economies of member states, the decline of democracy, increase in corruption, spread of disinformation, and the emergence of EU-wide protests. Certain EU member states have been experiencing a Covid-19-induced increase in authoritarian government tendencies that led to a further decline in democracy. This is a factor of uncertainty for the regional stability of the EU, because it represents the undermining of those pillars on which the Union is built, as well as a destabilization of its unity. Poland and Hungary are considered the most affected countries. The right-wing-oriented governments of both states repeatedly demonstrate that they do not adhere to the common EU values and norms, such as the rule of law and human rights and freedoms. The Covid-19 pandemic reinforced this trend and opened new opportunities for such countries to further pursue their authoritarian tendencies. The recent "forced" compromise that was reached at the end of 2020 in regard to the conditionality of the next *Multiannual Financial Framework* (MFF) 2021-2027, as well as the *Next Generation EU* COVID-19 recovery package, clearly showed that Hungary and Poland stand together on this matter and are not planning to redirect their course towards full-fledged democracy. Thus, any sanctions-process can only be initiated by the EU Commission after the European Court of Justice (ECJ)¹⁰ rules on the new mechanism. The newly formulated compromise deal will most likely turn out to be ineffective in practice. The latter shattered the very aim of the initial promising clause that could have achieved a positive change regarding the adherence to the rule of law. This makes it clear that the future battle for stronger democracy fought by the member states is far from over and will be a decisive battleground throughout 2021.¹¹

Fake news or hybrid threats should be considered as a major destabilizing factor for the future of the region, which became an even more active and dangerous phenomenon in the wake of the Covid-19 crisis. Online disinformation in times of the pandemic proved to be a powerful tool of deception that resulted in an increased polarization of society and a growing distrust towards governments. Furthermore, it continues to impede the effective implementation of anti-corona measures imposed by governments. Moreover, in a health crisis, false information has sadly proven to cost human lives. Currently, the ongoing pandemic has reached a critical point in several member states and therefore additional measures to tackle and decrease the spread of disinformation will likely be considered as one of the priorities for 2021.¹²

Throughout Europe, a trend of increased protests continues as the result of citizens' dissatisfaction with current corona-induced developments in the EU. This is unlikely to change for now, given the turbulent reality that the EU is currently faced with: ranging from the worsening of the pandemic and the tightening of associated measures to economic recession and increased unemployment. Europe is facing a severe economic crisis comparable to, if not worse than, the 2008 financial crisis. At present, global debt and possible tendencies toward a prolonged recession are increasing, exacerbated by defaulting companies. It is not clear when the Covid-19 pandemic will finally be pushed back and how much economic damage will inflict at the end of the day. However, a weak economy, rising unemployment, and the collapse of numerous small and medium-sized enterprises (SMEs) will have a negative impact on the population and deteriorate its confidence in state governments and contribute to further protests.

The EU's historic Recovery Plan

The Covid-19 crisis is firstly a humanitarian crisis that might lead to a global financial and economic crisis. For the year 2020, the International Monetary Fund (IMF) predicts an increase in the cumulated worldwide loss of \$11 trillion relative to

pre-Covid-19 estimates and projected up to \$28 trillion by the end of 2025.¹³ Furthermore, the European Central Bank projected a loss of 7.3 percent of real GDP in the euro area in 2020.¹⁴ Especially the south of Europe was heavily affected by the collapse of production, trade, and tourism, as well as suspended mobility, and capital outflows.¹⁵ The EU's answer to this development was the adoption of the largest financial aid package in EU history, accounting for a total of €1.8 trillion, that will support member states during the time frame 2021 to 2027. This consists of two stimulus packages; the *Multiannual Financial Framework* (MFF) with €1.074 trillion, coupled with *NextGenerationEU* with €750 billion. While *NextGenerationEU* is a temporary instrument that seeks to boost the recovery ad hoc, the MFF is designed to finance the recovery and the reconstruction of the economy in the long run.¹⁶

Starting next summer, 13 percent of the overall budget will be made available to the member states.¹⁷ Several specifications about the recovery plan are exceptional: besides the fact that it is the largest financial package ever funded through the EU budget and the conditionality of the rule of law compliance, the package also ties environmental and digitalisation goals to the disbursement of funds. Consequently, the EU not only seeks a quick recovery and reconstruction of the economy, but also aims to enhance a greener and more digitalised transition. Therefore, more than 50 percent of the budget is dedicated to support modernisation efforts such as research and innovation through *Horizon Europe*, fair climate and digital transitions through the *Just Transition Fund*, and the *Digital Europe Programme* as well as preparedness, recovery, and resilience through the *Recovery and Resilience Facility*, *rescEU* and *EU4Health* – the new European health programme. Additionally, 30 percent of the EU funds are devoted to fight climate change, which is so far the highest share ever dedicated to mitigating climate change, aiming to help achieve the EU's new climate target – the reduction of CO₂ emissions by 55 percent by the year 2030 – and further accomplish climate neutrality by 2050.¹⁸ This transition will be financed

by the private sector through taxation and new green bond standards. In addition to the crucial role of climate policies in the new recovery plan, the Commission also aims to use the *Recovery and Resilience Facility* to establish new opportunities for those, who were affected most by the pandemic and set the ground for further initiatives to enforce the European Pillar of Social Rights and make the economy more resilient against future shocks.¹⁹

Governments have to submit detailed recovery plans by April 2021²⁰, which are not only well elaborated, but also comply with the requirements of climate policy, digitalisation, and modernisation. While some member states' applications have already been approved, the majority of governments have yet to submit their proposals.²¹ Since some countries have struggled in the past to receive EU funding – e.g. Italy – a late or not detailed enough submission may pose entry restrictions that could especially impact the south of the EU negatively. This suggests that those countries that already have submitted their plans and got them approved have gained a strategic advantage compared to those with still pending submissions and/or approvals. Moreover, although member states will receive a substantial amount of money, it will strongly depend on national priorities and the influence of various lobbies if and how effective the funding will prove. Since SMEs are particularly affected by the crisis, advocates are urging the EU as well as national governments to spend the money effectively, to prioritise SMEs instead of big organisations, and to provide direct, fast, and simple access to the funding.²² A lot will depend on individual member states' priorities and decisions this year whether the funds will flow to the right places and allow the EU economy to compete effectively in the post-Covid-19 world economy.

Common Security and Defence Policy 2021

The EU has been marked by a decade of consecutive crises and will continue to face a complex and occasionally unpredictable security environment - among others a more assertive Russia, a strengthened China, instability in the Middle East and

North Africa and continuing terrorist threats. The military conflict in Libya, which is causing France and Italy to (geopolitically) drift apart, and the resurgence of the 'frozen' conflict between Armenia and Azerbaijan over the Nagorno-Karabakh region, once again highlighted the limits of the EU's Common Foreign and Security Policy (CFSP). In addition, the Covid-19 crisis and the Brexit negotiations demanded the full attention of decision-makers on the EU and member states level respectively, thus further exacerbating the existing lines of conflict. Given the turbulence of the past years and the strategic challenges ahead, the EU-27 will have to adapt to the new global political reality and focus on deepening European defence cooperation, in order to effectively counter the threat of geopolitical irrelevance.

The COVID-19 crisis will continue to preoccupy the EU and could prove detrimental to Europe's security and defence in many ways – strategically, economically, and politically. What started out as a health crisis is now expected to lead to an unprecedented financial crisis and renewed cuts in the member states defence spending. All this has the potential to bring the dynamic development of CSDP over the last years to a standstill and make Europe more vulnerable. Less spending than was anticipated before the pandemic on the European Defence Fund (EDF), the European Peace Facility (EPF), and the space sector are already a reality.²³

The current debate between France and Germany regarding the strategic autonomy of the EU will also remain a central issue.²⁴ It reflects diverging positions on the EU's geostrategic orientation and contributes to a further polarization within the union – Paris and Berlin have different viewpoints as to how the credibility of the European security and defence policy should be enhanced. A weakened Franco-German axis would slow down or even hamper the development of CSDP.

With the United Kingdom's withdrawal, the EU lost one of its strongest military powers, the most capable European maritime force, and a nuclear power with a per-

manent seat on the UN Security Council. Although a No-Deal Brexit was avoided at the very last minute, the full extent of the Brexit implications remains unclear. It can be expected that London will focus mainly on its relationship with the US and become more involved in NATO structures. Hence, there is a pressing need to redefine security and defence cooperation with the UK in a solid way in order to integrate London as closely as possible into the European security architecture. A positive development in this respect occurred during the German EU-Presidency, when an agreement was reached that allows third countries to participate in PESCO projects (provided they fulfil a number of political and legal preconditions).²⁵ Future UK's participation can thus not be ruled out.

Turkey will continue to pose a factor of uncertainty for Europe. The gas dispute between Greece, Cyprus, and Turkey could further intensify, leading to a deadlock situation which will have a negative impact on both EU-NATO relations and on Turkey's bilateral relations with individual member states. The increasingly unilateral actions of Ankara and President Erdogan's authoritarian stance have the potential to irreversibly damage relations with the EU.

NATO will remain the principal framework for European security, although with the UK having left the EU, 80 percent of NATO defence spending will now be covered by non-EU countries.²⁶ Like his predecessor, it is expected that the new US President, Joe Biden, will pressure Europeans to contribute more to the Alliance, but at the same time he will try to restore European trust in the United States and the transatlantic relationship. Although an increasingly interconnected transatlantic security environment is undeniable, in parallel to closely cooperating with NATO, the EU will continue to pursue a deepening of European defence integration and autonomy through PESCO and the EDF.

EU Space Policy

The topic of space has gained incredible momentum towards the end of the second decade of the 21st century, be it from an

economic perspective, in the context of security and defence, or related to the very basic human desire for exploration and discovery. Breakthroughs in a vast array of technologies have allowed the private sector to play an increasingly important role in space, a phenomenon termed “New space” and exemplified by companies such as SpaceX or Blue Origin, but also governments have re-discovered space as an area that offers tremendous opportunity. Technological advancements have opened a window of possibilities that is met with great ambition, spanning from settlements on the moon and Mars to new satellite capabilities that offer unprecedented strategic advantages, increasingly spurring competition among the space-faring nations. The promise of prevailing in this competition is multi-layered and includes economic gains just as much as military supremacy and the sheer prestige that comes with it. This trend will further intensify in the year 2021 and beyond.

While in recent years it was mostly the USA, China, and Russia that dominated the headlines with ambitions in space, the EU too has demonstrated a willingness to be at the forefront of the new Space Race. A driving factor behind this development is the realization that space is a vital element of the EU’s strategic autonomy, the strategic imperative that continues to dominate many areas of policy making in contemporary Europe. Especially the EU’s current flagship programmes Galileo and Copernicus, the former being a Global Navigation Satellite System (GNSS) and the latter a global earth observation programme, have greatly enhanced and expanded European space-based capabilities and thus European autonomy.²⁷ While these two indisputably represent milestones, what the EU yet lacks is a next-generation European space-based communication system that provides a high level of reliability and resilience. To this end, the European Commission has launched a year-long feasibility study for 2021 with a budget of €7.1 million for a third EU flagship programme to build upon the existing GOVSATCOM programme, which would “provide secure communication services to the EU and its Member States as well as broadband con-

nectivity for European citizens, companies and mobility sectors”.²⁸ Additionally, it would complement the existing European space infrastructure and enhance the services provided by Galileo and Copernicus. For the EU to remain competitive and above all achieve autonomy in the digital age, as well as stimulate demand for the European space industry, this new flagship programme for state-of-the-art connectivity represents a vital initiative.

Another area crucial to Europe’s interests is unhindered access to space, which in the past years was characterized by dependencies on the USA or Russia. Therefore, as Thierry Breton, Commissioner for Internal Market, declared in his welcome address at the 13th European Space Conference in January 2021, the Commission would initiate the European Launcher alliance to establish with all the important stakeholders “a common roadmap for the next generation of launchers and technologies relevant to ensure an autonomous access to space”.²⁹ Especially in the light of rapidly progressing and disruptive launcher technology in the USA and (to a lesser extent) China, namely the use of reusable rockets, Europe had to pursue a more “aggressive and offensive strategy” in this area than it has in the past, the Commissioner said.

A further important space-related development in 2021 will be the establishment of the European Union Agency for the Space Programme (EUSPA), replacing and expanding the current European GNSS Agency (GSA) located in Prague, Czech Republic. GSA has for the past 15 years managed the EU’s Galileo programme with a staff of roughly 100 people. As EUSPA, the staff will be increased to around 700 personnel and besides Galileo also manage Copernicus, GOVSATCOM and the EU’s Space Situational Awareness (SSA), which monitors man-made as well as natural objects in space as well as space weather.³⁰

This step is in line with the European Commission’s goal to create a “fully integrated space programme” for the years 2021-2027, on which the Council and the Parliament already reached a provisional political agreement on December 16th,

2020. The EU Space Programme 2021-2027 would amount to €14,8 billion in current prices, of which €9,1 billion would be allocated to Galileo and EGNOS, €5,42 billion to Copernicus, and 442€ million to GOVSATCOM and SSA. What is remarkable about the new Space Programme is that it for the first time unites all EU space activities under one umbrella and besides providing the biggest ever EU budget for space – although being smaller than initially anticipated due to Covid-19 – it will also simplify and streamline the existing EU legal framework on space policy.³¹ *“Europe is the 2nd space power in the world. But the global race is on. With this agreement, we now have the means to develop our leadership in space by consolidating our flagships – Galileo and Copernicus – and exploring new initiatives that will enhance Europe’s resilience, notably in secure connectivity”,* said Thierry Breton, hinting at the planned third EU flagship programme.³²

Commissioner Breton most certainly set the expectations very high when it comes to the EU’s space activities in 2021, calling it a defining year for Europe’s space strategy and for its position on the global space stage.³³ Considering the staggering technological developments in this domain and the level of ambition displayed by other actors like the USA or China this is, however, exactly the kind of vigor that Europe needs in order to not only defend its position as a global space power, but to amplify it. Looking at the year ahead in European space policy and activities, there appears to be a newfound dynamic in the sector which hints at the potential for considerable progress in the coming months. This development is to a large degree owed to the EU having established itself as a devoted driver for space affairs in Europe in recent years, a trend which was further reinforced through the creation of the Directorate-General for Defence Industry and Space and the commitment of its commissioner Thierry Breton. In the EU’s pursuit to become a geopolitical and above all strategically autonomous actor, space policy, industry, and applications will play a central role. 2021 could prove to be of great significance in this regard.

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