Blank Canvas: An Opportunity for Europe?

7th Open European Dialogue, Lisbon, 9th-11th September 2022

BRIEFING NOTES

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Europe, and indeed, the world, has been confronted with unthinkable challenges and crisis over the last couple of years.

After nearly three years of remote meetings, the Open European Dialogue—Europe's first informal cross-party and cross-country platform for members of parliament—has reconvened to offer a moment of reflection for policymakers across Europe to come together to exchange perspectives on the evolving political landscape.

Concerns about Covid vaccine rollouts and testing capacities were abruptly replaced by concerns about the Russian aggression of Ukraine, the disruption of energy supply, the rapid escalation of inflation, and the impact on citizens across the continent, especially on the parts of society most adversely affected by the economic downturns associated with Covid.

For a stable region like Europe, a global pandemic, an active war, and 9 percent[1] annual inflation rates, just a few years ago, would have appeared as unthinkable.

Yet, over the past three years, policymakers have juggled medical recommendations, intelligence reports, and economic recovery plans. Now, in one of Europe's most crucial moments, politicians are faced with decisions that could determine the trajectory of the continent for the coming decades.

While we will not, and cannot, aspire to solve issues of this magnitude, complexity, and consequence in just over two days, we invite the Open European Dialogue community of policymakers and thinkers to come together for a moment of reflection and to take a step back from day-to-day politics and ask: have we truly understood the scope of these challenges?

How can we make use of the different political and personal perspectives that will be joining us from across the European continent to better understand the political challenges that lie ahead for Europe and the world?

During the coming days, participants will have the chance to touch upon the thematic issues mentioned in these briefing notes, as well as propose their own discussion topics, and choose the degree to which they wish to dig deeper into any given thematic area.

Please note, these briefing notes are intended as a mere conversation starter, they are not comprehensive overviews of these policy challenges, nor do they reflect a set agenda.

Understanding the Ukrainian war and its geopolitical implications

Life After Covid: The aftermath of Covid-19 on our societies and our economies

Critical Transitions I: Energy security and supply in the context of the green transition

Critical Transitions II: The acceleration of the digitalization agenda and its implications on society

Editors: Chiara Rosselli, German Marshall Fund, Adriano Rodari, APROPOS, Leonhard Hemmerlein, German Marshall Fund

Contributions by: Federico Castiglioni, Istituto Affari Internazionali and a special thanks to our cohort of Guest Experts for their additions

Understanding the Ukrainian war and its geopolitical implications

How is Europe managing the ongoing conflict? What did we miss for us to get here? **What lessons learnt, if any, are available for politicians and institutions?**

How has the conflict affected our understanding or desire for European strategic autonomy? Has enlargement truly made it back on the agenda? What to make of Europe's relationship with Russia in the short and long term?

Are we witnessing the emergence of a new security paradigm on the continent? **Is a new global order afoot? How do we restore the functionality of rule of law and reimbue the international system with trust?**

As Russian troops launched a full-scale invasion of Ukraine on the night of February 24, European leaders swiftly condemned Russian President Vladimir Putin and loudly stated their support for Ukraine.

Countries like Poland, Slovakia, and Romania witnessed first-hand refugees fleeing from all corners of Ukraine, queuing for hours at borders.

In an unprecedented move, European capitals agreed to give a temporary status to Ukrainians that grants them many of the same rights

to live and work in the EU as the bloc's own citizens.[2]

As of the end of August, **6.9 million Ukrainian refugees** are known to have been welcomed across the EU.[3] However, since Kyiv and other areas of Ukraine were liberated, more and more people have been returning to their home country.[4]

Nearly **70 percent of Ukrainians think the country will join the EU within the next 5 years**,[5] though it is not yet clear how large of an economic effort will be required by Ukraine and its partners for this scenario to be viable.

Countries across the world have stepped up to support Ukraine financially. In total, the EU is the second largest foreign donor to Ukraine at €16.24 billion, right after the United States.[6] Yet, **Ukrainian officials have flagged that financial aid needs to flow in a swift and sustained manner into the country, which has been running a budget deficit of around $5 billion per month since Russia's invasion**.[7] If not, Kyiv will be unable to cover its costs, including pensions, and risks financial collapse.[8]

While major European economies like Germany and France have donated more in absolute terms, **the countries bordering Russia have made a relatively greater economic effort, with Estonia donating the highest amount per capita**.[9]

When it comes to supporting military efforts, the United States is by far the largest donor, having committed $8 billion in military aid since the start of the war. **Commitments by European countries to support Ukraine militarily have been less ambitious and are on a downward trend**.[10] In July, for the first time since the beginning of the conflict, Europe's six largest countries offered Ukraine no new bilateral military commitments.[11]

These trends are interesting to observe also through the lens of the European strategic autonomy debate. With the start of the conflict, the issue of a higher degree of 'European sovereignty' seemed to have gained momentum, yet, in the six following months, there has been little alignment on what more autonomy would mean for the EU, Ukraine, and the future of the entire continent.

FACTS & FIGURES

A reversed pattern // Unlike previous refugee waves, Central and Eastern European countries have been hosting more Ukrainian refugees than Western member states.[12] In Poland, some cities saw a dramatic increase in inhabitants.

1/3 of people currently living in Rzeszów and **1/4** of people currently living in Gdańsk came from Ukraine.[13]

1.3 million refugees are registered for temporary protection in Poland.[14]

11.5 million is the number of refugees' movements out of Ukraine (from February 24 2022 through August 30)[15] yet **5 million** border crossings were recorded back into Ukraine (from February 24 through August 30).[16]

6.6 million is the estimated number of Internally Displaced People in Ukraine.[17]

The largest donors // The United States and United Kingdom have committed to support Ukraine primarily through military aid (respectively **€25** and **€4 billion**), while the EU institutions have largely invested in financial assistance, by donating **€12.3 billion.**[18]

Support as a percentage of GDP // The Baltic countries and Poland have donated the highest percentage of their GDP to Ukraine. Estonia and Latvia gave close to 1% of their GDP through bilateral aid.[19]

Here's some examples:

- Estonia 0.83 %
- Latvia 0.80%
- Poland 0.49%
- Lithuania 0.32
- Norway 0.36
- Slovakia 0.19%
- Czech Republic 0.19%
- United Kingdom 0.24%
- United States 0.22%
- Netherlands 0.05%
- Germany 0.08%
- France 0.04%
- Italy 0.03%

Public opinion matters // As of a poll in June, 42% of Germans agreed that support for Ukraine Military aid was adequate, while 23% of respondents thought their government went too far.[20]

POLICIES AND KEY INITIATIVES

Lithuania's crowdsourcing for Ukraine's army: Lithuanians raised close to €6 million to buy a Turkish-made drone for Ukraine, largely through small donations.[21]

Visa ban: Eastern and Northern countries, including Estonia, Latvia, Lithuania, Finland, Denmark, Poland, and the Czech Republic, joined forces to introduce far-reaching EU-wide action that would suspend or drastically reduce the issuance of visas for Russians.[22] Finland, which has seen many Russians crossing into the EU through its border, has announced it will reduce Russian visas by 90 percent due to Moscow's ongoing war on Ukraine.[23]

ADDITIONAL RESOURCES

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Life After Covid: The aftermath of Covid-19 on our societies and our economies

Having spent more than two years in a pandemic and reiterative series of lockdowns, we have yet to fully grasp the long-term consequences of Covid-19 on our societies and economies.

What effect has the pandemic had on the ultra vulnerable and on standards of inequality? Have pre-existing societal fault lines and weaknesses been exacerbated? What has happened to our way of organizing society and communities?

What impact has it had on the productive motors of our economies—from supply chains to changing trends in the future of work?

What prospects does recovery offer, and what role can the European Recovery Fund play? To what extent have massive European and global financial interventions challenged our traditional understanding of predominant economic paradigms and models?

Has the crisis provided a new lens to re-imagine our vision for the future?

As of mid-August, over 2 million Covid-related deaths have been registered in Europe since the beginning of the pandemic. Although many tried to forget about the bleak memories of lockdowns over the summer, a sizable part of the population has been dealing with the long-term consequences of the pandemic.

Since the beginning of the pandemic, the global prevalence of anxiety and depression has risen by 25 percent and this number is not expected to be reabsorbed by the lifting of restriction rules.[24]

An increase in domestic violence has disproportionately affected vulnerable groups, specifically women and children, during periods of quarantine in Europe.[25]

In economic terms, and on a global scale, inequality has risen sharply during the pandemic and disproportionately affected lower income groups.[26]

At a macroeconomic level, the consequences of China's continued pursuit of its Zero-Covid policy have continued to disrupt global supply chains, forcing policymakers and businesses alike to question the supply chain model of "just in time delivery".[27] **The IMF suggests that losses from delivery disruptions alone amount to 1.5 percent of this year's inflation forecasts**.[28]

In order to counter continued uncertainty, new policies and narratives are beginning to emerge.

The European Commission's raw materials strategy[29] as well as Brussels' efforts to develop critical industries, such as the production of semiconductors, on European soil, are aimed at strengthening the EU's strategic autonomy in the face of global shocks.[30]

A revival of the globalization versus localization debate seems to be making its way back on to the political agenda.

The pandemic, almost overnight, turned a slowly rising trend into a mainstream reality as many businesses began operating with an almost fully remote workforce.

With the pandemic easing up, citizens are fighting to keep their right to work remotely. Despite employers urging a return to the office, 52 percent of employees who switched jobs during the pandemic expect flexibility from their new employers regarding remote and hybrid work modes.

Working from home is seen as a sustainable alternative to commuting. However, researchers have pointed out the underestimated carbon footprint deriving from the digital infrastructure needed to sustain hybrid work,[31] which is often not fully accounted for. [32]

Although the pandemic exposed weaknesses in our social and economic structures, it also highlighted the resilience of societies.

Many international organizations, such as the UN and the OECD, have dubbed **the pandemic as an opportunity to remake society for a better future**.[33]

The question is: are we delivering on this promise, or are we squandering this crisis?

FACTS AND FIGURES

Europe is facing an increasing shortage of healthcare workers[34] // In Germany, for example, more than 35,000 positions remained unfilled across the sector at the end of 2021, an increase of about 40% within a decade.[35] In countries like the United States, U.K., Singapore, Japan, and France, **1 in 3 nurses** are considering quitting within the year, as pandemic fatigue and burnout hits them.[36]

Feeling worn out // Since 2020, the share of people reporting feeling too tired after work to do necessary households chores has been growing from around 20% to almost 30% in 22 OECD countries.[37]

Tourism figures // It is estimated that 18,000 pilots, almost a third of the entire pilot population, were laid off during the pandemic. In part, this contributed to the large number of delays and travel chaos over the summer.[38] Of the total number of flights cancelled worldwide in August, almost 60% were in Europe.[39]

Losing trust in institutions // After an initial boost, trust in institution is showing signs of decline in 22 OECD EU countries.[40]

POLICIES AND KEY INITIATIVES

The Dutch adopt the right to remote: The Dutch parliament has introduced work-from-home as a legal right, adapting working regulations based on the wishes of the electorate.[41]

Ecosystem collapse prevention: To tackle ecosystem collapse and decrease the likelihood of future pandemics and shield us from the climate crisis, the EU Commission has proposed a **Nature Restoration Law** to repair European natural habitats that are in poor condition, which according to the Commission's estimates account for 80% of the continent's habitats.[42] If the law passes, it will require Member States to **develop national plans to restore at least 20 percent of EU land and sea by 2030**, and repair all ecosystems in need of restoration by 2050.

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Critical Transitions

To what extent do energy and digital politics have the potential to dramatically alter the systemic and societal paradigms we operate in today? What role do policymakers have in managing and chaperoning these critical transitions? Have recent crises exacerbated tensions or accelerated mobilization around these seemingly all-pervasive policy challenges?

Critical Transitions I: Energy security and supply in the context of the green transition

The war in Ukraine has contributed to the disruption of the energy supply for most European countries, prompting urgent questions on their energy strategies moving forward, particularly for those most reliant on Russian energy.

How are countries mobilizing to address energy supply disruptions and skyrocketing costs? Has this crisis provided an opportunity to accelerate Europe's green transition?

What are the effects of current events on overall public attitudes and voter expectations toward climate action?

Is the European Green Deal set to place Europe's energetic future on track towards greater independence and cleaner technologies? What investments, market considerations, and strategic decisions lie ahead?

Can policymakers balance a value-based foreign policy and rising climate concerns against the current needs dictated by the energy crisis and rising inflation—and at what cost?

While fires and droughts devastated different regions during the summer, most European governments were already looking ahead to the winter. European countries managed to reach their 80 percent gas storage target during the summer, but at a high cost.[43] **As of the end of August, gas prices were 12 times higher than at the start of 2021.**[44] While the spike in prices risks destabilizing countries, as citizens face doubled energy bills, governments remain concerned about supply.

In 2021, around 40 percent of the total gas consumed in the EU was imported from Russia,[45] though the share of Russian gas has dropped dramatically over the last months.

In July, Norway surpassed Russia as the primary supplier of gas to Germany, a historical change.[46]

To replace Russian gas, EU countries have been looking for alternatives. For instance, **Italy has struck a deal with Algeria to boost gas supply[47] while other countries have also been looking at LNG (Liquified Natural Gas), especially from the United States.**

While the disruption of gas supply caused by the war is expected to continue through the upcoming winter, it raises questions about long-term ambitions toward a green energy transition. As part of the European Green Deal, countries had agreed to cut their emissions to 55 percent by 2030.[49]

The conflict in Ukraine has further disincentivized Europe from relying on cheap Russian gas, highlighting the importance of renewables. **Yet, post-lock-down supply disruption and higher inflation have further slowed investment in renewables**.

For instance, energy companies are experiencing delays of up to a year for their renewable-energy projects, largely due to supply-chain issues and higher transport costs.[50]

These delays come after a decade during which Europe spent relatively little on renewables. As countries now seem to be set on quickly transitioning to renewables, they are demanding the EU take action regarding energy prices.

Currently, the European electricity market is based on the so-called merit order mechanism, which determines the price based on the marginal costs of the most expensive power stations. Interestingly though, the most expensive power stations are the ones currently using gas, driving up costs disproportionately also for plants and countries that rely mainly on cheaper renewable resources.[51]

Short-term measures to cap energy prices have been costly, in countries such as Greece these have so far cost the government almost 4 percent of GDP.[52]

Lawmakers are pushing hard for an intervention on the European level, with some demanding a price cap or a complete dismantling of the market mechanism.[53]

However, not all agree with the possibility of ripping up the current system. The EU's energy agency, ACER, has warned against tearing up the market structure, and instead suggested exploring a temporary relief valve.[54]

In this context, the debate on nuclear energy has been revived across many European countries.[55]

FACTS AND FIGURES

Citizen Concerns: #1 is rising prices // As early as April, rising prices were the main concern for consumers across Europe.[57]

Clean energy investment grew by only 2% a year in the five years after the Paris Agreement was signed in 2015. But since 2020, the pace of growth has accelerated significantly to **12%.**[58]

The U.S. is already sending more gas to Europe than Russia // Europeans have been buying more and more U.S. gas, taking 68% of U.S. gas exports in the first half of 2022 (up from 35%). This situation though may not be sustainable as Asian and Latin American markets compete with European demand, raising prices and redirecting the American export market.[59]

Consequence on the Euro currency // Rising energy prices have had a devastating effect on the Euro's value, which has dropped to a 20-year low.[60]

Wind farms // According to WindEurope's Annual Statistics 2021, the **EU built only 11 GW of new wind farms in 2021, while the bloc would need 30 GW a year of new wind farms** to meet its 2030 renewables target.[61]

Natural gas and electricity prices are trading more than **1,000% higher** than the levels seen in the 2010 to 2020 decade.[62]

A (slight) increase in renewables // In 2020, renewable energy sources made up **37.5%** of gross electricity consumption in the EU, up from **34.1%** in 2019.[63]

The inflation rate in the Euro area reached 9.1% in August 2022 – largely as a result of energy prices (38.3%), followed by food, alcohol and tobacco prices (10.6%).[64]

POLICIES AND KEY INITIATIVES

REPowerEU: In response to the energy crisis, this European initiative is meant to ensure energy security for European consumers and support a rapid green transition.[65] The plan foresees actions in areas like efficiency and supply diversification through investments, reforms, and coordination among member states.[66]

Cities in action: In March 2022, **Amsterdam drastically reduced its dependence on gas by decreasing heating temperatures in public buildings** from 21°C to 18°C, with the exception of sensitive areas such as hospitals and archives.[67] During the summer, some German cities, such as H**anover, reduced consumption of energy by temporarily imposing cold water in public buildings** and turning off lights during the night.[68]

Spain's air conditioning law: The Spanish government announced plans to prevent offices, shops, and other venues from setting air conditioning below 27°C in the summer.[69]

Using less gas this winter: European countries have agreed to voluntarily reduce natural gas demand by 15 % during the winter, in order to prepare for possible disruptions of gas supplies.[70]

Germany's cheap train tickets: To help people deal with record inflation and oil prices, this summer Germany offered a sharply discounted fare for local and regional public transit. The €9 ticket helped cope with the rising costs of energy and prevented around 1.8 million tons of CO_2 from being released into the atmosphere.[71]

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TEDxTalks (2022), **How to realistically decarbonize the oil and gas industry** | Bjørn Otto Sverdrup, video

Critical Transitions II: The acceleration of the digitalization agenda and its implications on society

The potential and promise of the benefits of the digital revolution have been long praised. However, as its impact on our society unfolds, questions arise as to how to balance the transformative and disruptive natures of these technologies.

The increased speed of digitalization spurred by the pandemic has made these policy tensions all the more pressing and poses complex social and ethical dilemmas for policymakers.

How can we shape a digital world where concerns over cybersecurity and the management of increased digital risks are balanced against basic digital rights, like privacy and data sovereignty.

Claims that the “new normal”, post-pandemic world, is a digital one, beg the question regarding the state of digital regulatory policy—to what degree are we able to both protect citizens and foster growth, innovation, participation, and even education and societal wellbeing through digital means?

New technologies require us to rethink the ethical paradigms regarding privacy in our societies.

While an ecosystem such as the one required for 5G technology offers new opportunities for digitalization of public and private sectors, the complexity of the ecosystem poses unexplored security and privacy concerns.

Research highlights that ethical risks and challenges related to a lack of citizen awareness about the impact of technology might surge due to low levels of critical thinking and poor digital literacy.[72]

Besides, the accountability, trustworthiness, and reliability of technologies (e.g., AI, IoT, robotics, etc.) require careful exploration by policymakers legislating on new technological developments such as smart cities, e-health, and self-driving cars.

In the past decade, European countries have attempted to modernize their digital infrastructure. **Countries are now reprioritizing their public administration and pushing for the digitalization of key industries.**

However, it is not yet clear if prior commitments will suffice to bring the EU on par with global sector leaders in terms of GDP generated from the digital sector.

Although the EU Multiannual Financial Framework (MFF) for 2021–27 includes significant spending on the digital sector,[73] the U.S. digital economy is still set to reach 10 percent of national GDP, while Europe averages 6 percent with significant differences between member states.[74]

Still, the **approved European Recovery and Resilience Plans (RRPs) include 26 percent of the allocated budget to be spent on the digital transition** and address resulting challenges.

While Latvia plans to purchase electronic equipment for schools to close the digital divide for disadvantaged groups,[75] Denmark will support SMEs by investing in the use of technology and e-commerce.[76]

Yet, the digital transition has also been a source of friction in our societies, as **citizens demand more action from their governments to limit the disproportionate power of some tech companies on the single market**.

After the filing of court cases against U.S. tech giants in member countries, for example, in France against Apple's market monopoly structure,[77] the EU has increased efforts to improve its outreach to these companies by moving forward legislation such as the Digital Service Act and the Digital Market Act.[78]

However, concerns have been raised over the ability of current legislation to protect citizens' rights as policies like the ambitious GDPR had mixed and contested results[79] and concerns remain about ongoing legislation being heavily influenced by the tech industry.[80]

FACTS AND FIGURES

A gap in the digital economy and society // Whereas Finland, Denmark and the Netherlands score high in the Digital Economy and Social Index (DESI), countries in Central and Eastern Europe are still lagging behind in digitalizing their societies. However, new EU members are digitalizing at a faster pace compared to their Western peers.[81]

52% workers across the EU bloc need upskilling by 2025 according to DigitalEurope.[82]

€7.6 billion has been allocated for the Digital Europe Programme. This program is the central digital pillar of the Multiannual Financial Framework (MFF) and will strengthen investments in areas such as cybersecurity, supercomputing, and data processing capacities.[83]

€97 million are being spent annually by 612 companies, groups, and business associations lobbying the EU's digital economy policies. This makes tech the biggest lobby sector in the EU by spending, ahead of pharma, fossil fuels, finance, and chemicals.[84]

Rural – urban divide // The EU is marked by a persistent rural-urban divide on access to high-speed broadband, hindering equal opportunities. While Malta and Luxembourg ensure universal access to high-speed internet, more than **50 percent of Greek, Cypriote, and Italian households are still not covered.**[85]

Digital Gender Gap // Women obtain only 10% of patent applications in the EU, and less than 15% of start-ups are founded or co-founded by women (and only 6% by women-only teams). This translates into low amounts of capital invested into women-led companies, creating a vicious circle. This trend has also been worsening by the covid pandemic.[86]

POLICIES AND KEY INITIATIVES

An overarching strategy: European member states are set to align their investments in the digital sector under the umbrella of the **2030 Policy Programme 'Path to the Digital Decade'**.[87]

Curbing the power of tech giants: The debate on the **Digital Markets Act** and the **Digital Services Act,** passed in July 2022, centers on achieving state control over tech giants' handling of content.[88]

Boosting chip production: To avoid future shortages of semiconductors, the European Commission presented the **European Chips Act** in 2022.[89]

Digital taxation: Although a preliminary compromise was reached at the OECD for a global minimum tax rate of at least 15%, the implementation has been stalled after a Hungarian blockage. It is unclear how this process may be advanced.[90]

Digital diplomacy: The European Commission announced the opening of a San Francisco office in September. Other countries, like

Denmark, have already established a tech **diplomacy presence in Silicon Valley.**[91]

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