INPUT PAPER 2021 ANNUAL CONFERENCE
IS EUROPE STILL IN THE GLOBAL RACE?

28 OCTOBER 2021

Europe in transition
in a world in transition

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Table of contents

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Executive summary

2021 marks the beginning of a new decade that will likely be one of transition for Europe and the world. Today, the European Union's role in the world is framed by three main elements: long-term structural changes to the international system; global trends that impact Europe's power and influence; and the frontier domains that spring from the interplay between these structural factors and global trends. It is in these open fields – geovalues, geopolitics, geoeconomics, geotech, geoconnectivity and geosphere – defined by rivalry, competition, and cooperation that Europe's destiny can be mastered.

The six frontier domains bring up important questions for the EU and its member states: can a 20th century bureaucracy made up of intra- and inter-institutional policy silos and vertical decision-making structures, subject to 27 different national interests, manage Europe's transition into a new decade shaped by constant crisis? Considering the limited resources that the EU27 has at its disposal, what are the priorities and resulting trade-offs in dealing with the different frontier domains? Which are more important to keep Europe in the global race?

Managing the many parallel transitions Europe faces and navigating the different frontier domains in a state of permacrisis requires changes and reform at EU level. Tough decisions will have to be made about what the Union can or should do as a priority. Finally, it questions the role that the EU should have on the international stage.

To make headway, EU leaders should ask what kind of actor they want the EU to be in 2030 and beyond; learn from recent experiences and reform EU institutions to make them more efficient in responding to an era of permacrisis; and recognise that a strategic Union will need to make choices and set clear priorities.

The 2020s should build the foundations for an EU that is better prepared to master the challenges of the 2030s. By adapting to these tectonic changes and moving from crisis management to management through anticipation and foresight, there is a chance that the EU can stay in the global race.

2021: A year of transtion within a decade of transition

2021 marks the beginning of a new decade that will likely be one of transition for Europe and the world. If the last decades were a period of upheaval and undoing of central features of the global order built after World War II, a process accelerated and sharpened by the pandemic, the 2020s should build the foundations for a Europe that is better prepared to master the challenges of the 2030s. Is Europe ready for the world that is emerging?

Today, the European Union's role in the world is framed by three main elements: long-term structural changes to the international system; global trends that impact Europe's power and influence; and the frontier domains that spring from the interplay between these structural factors and global trends. It is in these open fields, defined by rivalry, competition, and cooperation that Europe's destiny can be mastered.

These features do not only impact the EU, but all actors the Union interacts with in the global arena. They make the world more complex, unpredictable, and a harder place for Europe to navigate and carve out a place of its own.

Structural changes

International politics is all but static. Over the last few years, the order built after World War II has evolved and transformed. Today it is more diverse, connected, competitive, and complex. There are several reasons for that, but four in particular explain the changes and the transition that global politics is currently undergoing.

The nature of power has changed. Traditional elements of power – population, territory, GDP and military might – are no longer sufficient to wield influence in today's world. Relationships, connectivity, technology, and soft power are as important to navigate the 21st century. Because of these transformations, power has also become more diffuse and dispersed, more horizontal than vertical, and the world more challenging, requiring strategic anticipation and flexibility. Together with power, the nature of threats has also changed. Hybrid threats, including the weaponisation of mundane goods and events such as information or movements of people, are on the rise.

individuals have joined nation states, international organisations, and multinational corporations on the world stage, making it more complex. Additionally, actors that have been dominant until now, such as Europe or the United States (US), are being tested by emerging powers with the ability to re-shape the international system and propose alternative governance models, like China, or promote instability, like Russia.

Governments – especially democracies – tend to lag behind when it comes to adapting to these technical transformations and offsetting the potential negative effects.

The pace of change is accelerating. The speed of the technological and digital revolution is increasing, a trend further bolstered by the COVID-19 pandemic. Governments – especially democracies – tend to lag behind when it comes to adapting to these technical transformations and offsetting the potential negative effects.[1] Technological supremacy has clear geopolitical and geostrategic implications in a world that is increasingly digitalised – from innovation, standards and regulation to disinformation, security, and cyber warfare.

The separation between the 'internal' and 'external' has eroded. In an interdependent and connected world, how we live, think, govern, work, produce, fight, and consume has consequences beyond national or regional

Traditional elements of power – population, territory, GDP and military might – are no longer sufficient to wield influence in today's world.

The number of players has increased. In the past few decades, the number of voices and participants in international affairs has grown. Non-state actors (malicious or not), private foundations, civil society, networks, cities and regions, as well as influential

borders. Global warming, the recent decline of democracy and freedoms, the rise of populists and autocrats, migratory pressures, protectionism, and challenges to the multilateral order are often the aggregate effect of preferences and decisions that are no longer confined to the countries in which they are expressed or made and require global, shared solutions.

Trends driving the transition[2]

In addition to these structural changes, some key global trends are driving the ongoing transition into a new global order.

The EU needs to take into consideration seven interconnected trends that will have great impact on its future and that have been accelerated and put into focus by the COVID-19 pandemic. Naturally, there are others to consider, but if these seven and their implications are well understood and managed, Europe has a better chance to be a player and, not a playground[3] and navigate the ongoing transition.

Three of these trends – connectivity, digitalisation, and climate change – can be considered 'meta-trends' because they affect all global players and all EU policies, as well as other key drivers of change. The remaining four are not exclusive to Europe, but they play a determining role in its future: demographic dynamics; the shift of economic power to the East; the decline of democracy; and the return of great power politics.

META-TRENDS – CONNECTIVITY | DIGITALISATION | CLIMATE CHANGE

Connectivity, digitalisation, and climate change are meta-trends of the 21st century. If there was still any doubt about the relevance of **connectivity**, the spread of the new coronavirus made clear that what happens in a food market in China matters to the rest of world, with devastating consequences – from the loss of life to the pressures on the global economy, health systems and public trust. The world is yet to understand the full impact of the pandemic on globalisation and existing value chains. But the drive for connectivity – physical and digital – grows stronger, with projections estimating that the number of globally connected devices could reach 200 billion by 2030.[4] While this trend seems unstoppable, the EU should consider and re-think its vulnerabilities and dependencies in light of the pandemic, including its preparedness to face new outbreaks and the resilience of its health systems.

Connectivity, digitalisation, and climate change are meta-trends of the 21st century.

Digitalisation and the tech revolution have been accelerated by the pandemic. Today, digital tech is an integral part of how many Europeans work, learn, consume, socialise, have fun, and access services.[5] But the benefits of digitalisation are not spread evenly – it has even led to growing inequality, as not everyone is able to access or make use of these technologies in their daily lives.[6] The tech revolution increasingly shapes geopolitics too. The ongoing race for dominance in Artificial Intelligence (AI), robotics, 5G, chips, quantum, and other disruptive technologies has profound consequences for Europe and how it positions itself in the world. For the moment, the EU lags behind in many of these technologies, especially when compared to the US and China. It will need to make massive investments to catch up.

In the future, no relevant political party with governing aspirations can stay out of the green debate and will need to offer solutions for what will amount to a life-changing, whole-of-society transition.

Climate change is bound to influence policy and politics in the next century and beyond. Following current trends, the global temperature is expected to increase by 1,5°C by 2040, and even earlier, if emissions are not drastically cut in the coming years.[7] This will likely accelerate the intensity and frequency of extreme weather events, droughts, forest fires, and loss of biodiversity, with important implications for everything from food (in)security to displacement of populations. The digital transition itself can run counter to climate action, as the need for rare materials to produce new technology products and energy to maintain and store data grows. But there may be a silent revolution in the making: the mainstreaming of 'green policies' across most of the political spectrum. In the future, no relevant political party with governing aspirations can stay out of the green debate and will need to offer solutions for what will amount to a life-changing, whole-of-society transition.

KEY TRENDS – DEMOGRAPHY | SHIFT OF ECONOMIC POWER | DECLINE OF DEMOCRACY | GREAT POWER POLITICS

Beyond these meta-trends, demographic dynamics, the shift of economic power to the East, the decline of democracy, and the return of great power politics will have a particular impact on Europe and its future global role.

While **demographic patterns** are mixed within Europe, the overall trend shows that there will be fewer Europeans, and they'll be older in general.[8] By 2030, 25.5 per cent of Europe's population will be over 65.[9] There are many implications, but by far the most relevant is the sustainability of Europe's welfare state (already strained by the pandemic), not to speak of migration, either real or imaginary. The mismanagement and politicisation of migration and refugees in the last few years, now revived by the tragedy unfolding in Afghanistan, has seriously undermined governments' leeway to look to migration as a possible solution to offset demographic decline. While immigration alone is not a silver bullet, other policy options such as robotisation or increasing retirement ages, are far from consensual within the EU.

Not only will Europeans be fewer and older, but Europe's economic power is also waning. The **economy** matters to Europe's role in the world, and it is projected that by 2030, the EU27 will become the world's third economic power after China and the US[10] and that the centre of economic gravity will progressively shift to the East. The fallout from globalisation and free trade that Europe and parts of the Western world experienced recently[11] not only fuelled the rise of populists,[12] but also made Asia a new champion of globalisation.[13] The measures to fight the pandemic led to a global economic downturn[14] but short of a collapse of the US, China or European economies, it is likely that the 2030 global economic podium will remain the same.

Europe's (and the West's) governance model is also being challenged worldwide. Until 2005, **democracy** and freedom were on the rise. But for the last 15 consecutive years, the adherence to fundamental rights and freedoms (of expression, religion, press, etc.) and the rule of law has been steadily declining. The COVID-19 pandemic has made matters worse.[15] In Europe too, democratic backsliding is spreading, as shown by the recent actions of the Hungarian and Polish governments. On top of that, the discontent with democracy,[16] the appeal of populists and that of alternative models that can provide stability and economic growth but few, or none, political freedoms, should be an eye opener for policy-and decision-makers when they consider Europe's place in the world.

Because there are no power vacuums in international politics, the 'take back control' and 'my country first' movements best exemplified by Brexit or Trump also helped foster the ongoing competition among different governance models that vie for global supremacy.

The global decline of democracy may also be a result of the recent return of **great power (strongman) politics**, which is testing the international, rules-based multilateral order, resulting in a more challenging environment for the EU. Because there are no power vacuums in international politics, the 'take back control' and 'my country first' movements best exemplified by Brexit or Trump also helped foster the ongoing competition among different governance models that vie for global supremacy. In addition, alliances seem to shift according to interests and transactions and undermine cooperative and collaborative solutions for problems that know no borders, such as a pandemic. The inequity in global vaccine distribution – as shown by the COVAX vaccination forecast[17] – is a stark reminder that the global cooperation and collaboration among scientists and universities to fight COVID-19 has not permeated to international politics

Frontier domains: 21st century playing fields

More than looking at these structural changes and trends in isolation, the interplay and interconnections among them reveal essential frontier domains for the EU in the coming decade. These are open, interconnected physical-virtual fields, shaped by rivalry, competition, and cooperation, where key global actors, including the EU, interact.

These frontier domains will influence the role that the Union will play in the international arena and help define what kind of actor it can be in 2030 and beyond. Equally, they should help determine the mechanisms, executive capacity, and matching financial resources that Brussels needs to mobilise to respond to the ongoing transitions and prepare for the future:

Geovalues. The EU is an organisation based on values such as democracy, rule of law, and fundamental rights and freedoms. The defence of these values should start at home. As a champion of multilateralism and the rules-based international order, the EU is increasingly challenged by others that do not play by the same

rulebook, or prefer other, more transactional and less inclusive forms of cooperation. Representative democracy within the EU itself is in crisis and needs to adapt to the digital age to meet the expectations of Europeans.[18] In parallel, strengthening democracy globally can be a crucial tool of the Union's international engagement, even more so if geographies and values' spaces become contested by alternative governance models. The pandemic also reignited the debate on value preferences: the question is more about what humans value than the values they hold (e.g., freedom vs. security or economic growth vs. sustainability). The way these debates evolve and may be explored by opportunistic political actors could create fractures within and between societies.

Geopolitics. The fault lines about values and ideas are also about power and influence. In a more contested and complex world of limited resources, EU rivals and partners alike increasingly assert their strategic autonomy and 'go at it alone.' One geostrategic dynamic that has direct consequences for the Union is the growing rivalry between China and the US. Beijing is becoming gradually more assertive on the world stage and Washington is realigning its strategic priorities and coalitions accordingly. The level of interdependence among today's global players makes this dispute very different from the Cold War, but it is unlikely that the EU can remain on the side lines. The 'distant' Sino-American dispute is compounded by challengers closer to home, such as Russia and Turkey. In a world shaped by rivalry and transactional relations, the EU should reduce critical dependencies and vulnerabilities, develop its own capacity and freedom to act in security and defence, and strengthen existing alliances, such as NATO, at the same time. The surge in hybrid threats, as well as the malign influence of disinformation within the EU and in neighbouring regions, are part of this larger geopolitical game.

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Geoeconomics. The EU ranks among the top three global economic players, along with the US and China. In a world of competitive interdependence, economic power will become increasingly relevant to project influence. The Union, therefore, needs to build a solid and resilient economic base. While there may be some indicators pointing to economic de-globalisation[19] (also fuelled by COVID-19) and a need to rethink global value chains to mitigate dependencies and supply-side vulnerabilities, it is unlikely that the current economic model will be ditched altogether. Economic and social policies will be

crucial in a post-pandemic world to address persistent inequalities and foster well-being within and between the EU27. Trade plays a crucial role in the EU's prosperity and global influence. The Union's new trade policy should contribute to a sustainable economic recovery in support of the green and digital transitions, as well as strengthen multilateralism and the reform of the global trade rulebook. Development policy should also be reconsidered to better lever the EU's economic power, allowing it to introduce reforms and bring stability in key strategic regions for the EU.

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Geotech. Emerging, disruptive technologies such as AI, 5G, robotics, the internet of things and semiconductors, increasingly shape global power relations and will also determine the future of the EU. Beyond the competitive side of 'technopolitics,' the EU has an interest to craft and use 'techplomacy' to advance its interests – from an open internet and transparent data access and management to democratic standards and regulations. The current race for tech supremacy between the US and China[20] has also geopolitical undertones and will be shaped by geovalues dynamics, with clear risks of technological de-coupling along ideological lines. Market access, regulatory heft and protective measures alone will not solve the EU's current digital laggard status. Shortcomings in funding, scale, and innovation need to be addressed. Coordinated competition rules, industrial policy, digital cohesion and an integrated and seamless digital single market are also crucial to drive the ongoing digital transition. New forms of cooperation such as the EU-US Trade and Tech Council are important new fora to foster as they can ultimately contribute to global standard-setting along with a new generation of trade deals.

Geoconnectivity. Physical and digital connectivity will continue to shape the EU's international role. Geopolitics and geoeconomics meet at the crossroads of connectivity and make it a crucial tool of international influence as well. The "Global Gateway," the EU's forthcoming connectivity strategy, will join existing strategies, such as the Chinese Belt and Road Initiative (BRI)[21] as well as the G7 Build Back Better World (B3W)[22] Partnership. These will be both spaces of competition and cooperation. But, put together, these strategies should be more than just attempts to gain clout. They should help mitigate the challenges posed by a lack of economic growth, inequality, climate-induced insecurity, poverty, and migration, as well as health, food, and water insecurity, in the regions where the arteries and the connectors of these plans will meet and intersect, especially in Africa.

Geosphere and biosphere. The protection of our planet and its biodiversity is, ultimately, the chief strategic challenges of the coming decades. If rivalry and competition are hallmarks of most frontier domains, the geosphere and biosphere will only survive through global cooperation and coordinated efforts that can reduce and mitigate the destruction of our environment. But the challenge goes beyond global cooperation. Addressing the current environmental and sustainability crisis will have implications for every human activity, from what we eat and how move to the ways in which we understand prosperity, well-being, and security. It is a life-changing transition.

The six **frontier domains** bring up important questions for the EU and its member states: can a 20th century bureaucracy made up of intra- and inter-institutional policy silos and vertical decision-making structures, subject to 27 different national interests, manage Europe's transition into a new decade shaped by constant crisis? Considering the limited resources that the EU27 has at its disposal, what are the priorities and resulting trade-offs in dealing with the different frontier domains? Which are more important to keep Europe in the global race?

Managing Europe's transitions in times of permacrisis and resource scarcity

Once the EU and its member states master the current pandemic, it is unlikely that Europe will enter a permanent 'new normal.' Rather than being the exception, a state of permacrisis[23] will be the environment in which Europe will continue to operate for the foreseeable future.

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Managing the many parallel transitions Europe faces and navigating the different frontier domains in a state of permacrisis requires changes and reform at EU level. Though decisions will have to be made about what the Union can or should do as a priority. Finally, it questions the role that the EU should have on the international stage.

The debate launched in 2017 on the future of Europe[24] is unfinished. Parallel to the Conference on the Future of Europe, but going beyond that, the EU, the member states, and European societies at large, should consider their role, internally as well as externally. Call it an EU audit that looks back and forward simultaneously and takes stock of the decade of crisis set off by Lehman Brothers collapse in 2008.

The French Council Presidency in the first half of 2022, building on the work of the German, Portuguese, and Slovenian presidencies, may be the ideal occasion to launch this debate with a clear timeline for its conclusion at the end of the Spanish Presidency in December 2023, ahead of a new institutional cycle that the 2024 European elections will inaugurate.

President Macron, the EU's "think tanker in-chief",[25] is never shy of thinking out loud about Europe and its role. More EU leaders ought to do the same. While he may be tied up in seeking re-election, France should use the rotating presidency to make headway in preparing Europe for 2030 and on the six frontier domains. Three unresolved issues stand out:

1) **The EU as an international actor.** The French Presidency will finalise the Strategic Compass for security and defence in spring 2022. This process provides the opportunity and framework to launch a broader discussion on what kind of international actor the EU wants to be in an increasingly complex and competitive world. In this context, the revision of the 2016 EU Global Strategy would be a useful exercise to understand how the EU positions itself in a world in transition, facing emerging frontier policy domains. As NATO is revising its strategic concept for the coming decade, it is high time for the EU to also take a deep look inward and ask itself what kind of actor it wants to be in 2030 and beyond. This process should set out a clear vision for the EU, and anticipate the ways in which the desired future may elude the best strategies and plans.

2) **The EU as an efficient actor.** A wholesale discussion and identification of what tools and processes can be mobilised within the current Treaties to build up the EU's executive capacity and its ability to deliver on key policy goals should be prioritised. The pandemic shed light on the EU's shortcomings and vulnerabilities, but also revealed a huge potential to jointly and successfully address common challenges; this was the case with the vaccine procurement, the Digital COVID certificate and the financing mechanisms in NextGenerationEU. This flexible and horizontal approach had already been tested with Brexit. A more efficient EU should improve its output legitimacy and better meet the expectations of Europeans. By identifying the EU's added value more clearly, the role for member states would also become clearer. This debate should not exclude policy areas where some

countries can move forward without prejudice to decisions that latecomers or 'never-comers' may take. The Commission should reign in the drive to further 'politicisation' and expand its "technical charisma"[26] to be seen as an impartial, honest broker. The risk of it becoming a partisan body, a sort of crossover between the European Council and the European Parliament, will limit its ability to independently deal with the potential fallouts of the permacrisis and be the EU engine for long-term thinking.

Managing Europe's transition, in a world in transition, shaped by irreversible structural changes, unstoppable global trends, and emerging frontier policy domains, requires a nimbler, anticipatory, and more flexible EU, which acts within the boundaries of democracy, internally and externally. The 2020s seem to be a defining moment for what the Union wants to do and where it wants to go. By adapting to these tectonic changes and moving "from management by crisis to management by foresight,"[27] there is a chance that the EU can stay in the global race.

The pandemic shed light on the EU's shortcomings and vulnerabilities, but also revealed a huge potential to jointly and successfully address common challenges.

3) **The EU as a strategic actor.** Being strategic means considering ends, ways and means. In a world of limited resources, it is likely that the EU will not be able to master all the frontier domains to the same degree and that hard choices might have to be made, both 'domestically' and externally. There may be trade-offs among interdependent policy fields. To give difficult, but concrete examples: What if a hard-line approach on EU fundamental values gets in the way of achieving the green transition? Another domain is geopolitics: Should the EU be a strong regional actor with global reach in some crucial areas or rather an over-extended global actor with limited regional security clout? Paradoxically, the solution to these dilemmas may be to accept that a 'common EU voice' in foreign affairs is next to impossible. What is more, in a world of frontier domains, all EU policies are 'foreign policy' because of their external implications. But to deal with that, the EU can use diplomacy or other tools, rather than try to harmonise 27 foreign policies.

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24 European Commission (2017b), White Paper on the Future of Europe: Reflections and Scenarios for the EU27 by 2025, Brussels, COM (2017)2025.

25 Momtaz, Rym, "Emmanuel Macron, think-tanker-in-chief," *Politico*, 19 November 2020.

26 An expression used frequently by former President of the European Commission, José Manuel Barroso.

27 Sentence coined in 2016 by Enrico Giovannini, current Italy's Minister of Sustainable Infrastructure and Mobility.

This paper was written as part of the conversations happening around the EPC's yearly Strategic Council and 2021 Annual Conference "Is Europe still in the global race?". The conference asks the question: in the face of seemingly insurmountable challenges and a changing and unstable geopolitical landscape, can Europe hold its own, or is it destined to bring up the rear in the global race for power and influence?

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