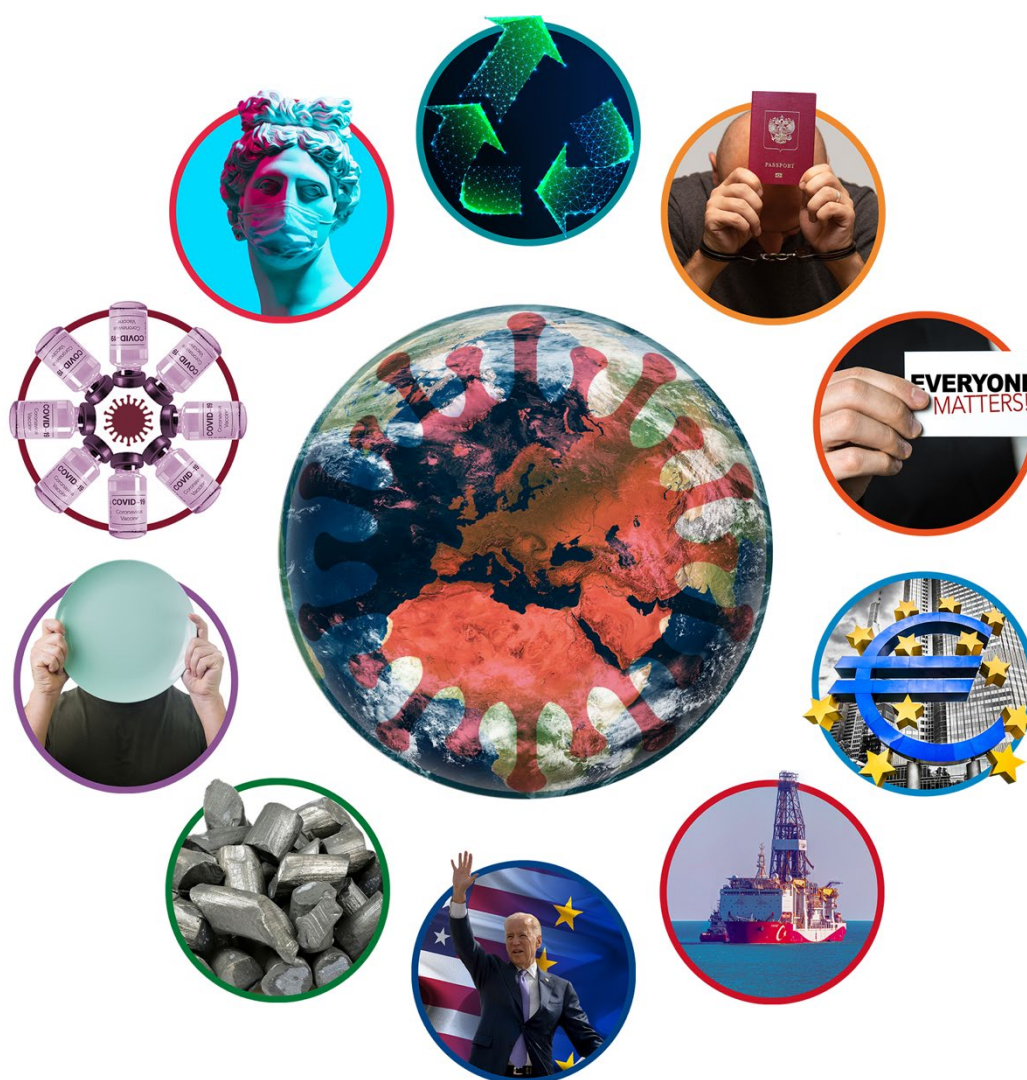




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# Ten issues to watch in 2021

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## IN-DEPTH ANALYSIS

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EPRS | European Parliamentary Research Service

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Members' Research Service  
PE 659.436 – January 2021

This EPRS publication seeks to offer insights and put into context ten key issues and policy areas that are likely to feature prominently on the political agenda of the European Union in 2021. It has been compiled and edited by Isabelle Gaudeul-Ehrhart of the Members' Research Service, based on contributions from the following policy analysts: Marie-Laure Augère and Anna Caprile (Food for all? Food for thought), Denise Chircop and Magdalena Pasikowska-Schnass (Culture in crisis?), Costica Dumbrava (A new procedure to manage Europe's borders), Gregor Erbach (A digital boost for the circular economy), Silvia Kotanidis (Conference on the Future of Europe, in the introduction), Elena Lazarou (A new US President in the White House), Marianna Pari (The EU recovery plan: Turning crisis into opportunity?), Jakub Przetacznik and Nicole Scholz (The vaccine race for health safety), Ros Shreeves and Martina Prpic (Re-invigorating the fight against inequality?), Branislav Staniček (Turkey and stormy waters in the eastern Mediterranean) and Marcin Szczepanski (Critical raw materials for Europe). The cover image was produced by Samy Chahri.

Further details of the progress of on-going EU legislative proposals, including all those mentioned in this document, are available in the European Parliament's Legislative Train Schedule, at:

<http://www.europarl.europa.eu/legislative-train/>

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## Introduction

The year ahead of us is critical in many ways: 2021 is the first year of recovery after the coronavirus pandemic hit the world in 2020. In the five-year European political cycle, it is a year in which progress towards significant action and implementation are expected, after a first year generally more focused on declarations and planning. And global events and geopolitical tensions make it no less critical at international level.

To help us to understand Europe and the world at such a critical time, the European Parliamentary Research Service (EPRS) has asked a dozen of its policy analysts to identify ten issues to watch in 2021, explaining why they matter and what we might expect in the year to come. With so many burning issues at stake in Europe and in the world, a selection of just ten is by definition subjective. Yet, it is the opportunity to place the spotlight on a series of topics selected for their obvious importance or original relevance.

This publication covers a broad spectrum of areas, most of which are affected directly or indirectly by the current coronavirus pandemic, reflecting how the crisis has impacted our lives and societies in nearly all their economic, social and cultural dimensions. The ten topics chosen include both issues that are at the very heart of the crisis – the vaccine race and economic recovery – and those that are starkly highlighted by it – such as access to food, discrimination, and the state of the performing arts – as well as some of the big background changes shaping the world we live in today – the digital, environmental and geo-political challenges ahead, from Europe's borders to its transatlantic relationship. These ten issues echo some of the ten opportunities spotted for Europe post-coronavirus in our July 2020 publication exploring potential opportunities that the crisis might offer to improve policy for the future.

The central nature of the coronavirus crisis and its overall impact in terms of global responsibility, from vaccines for all to the climate objective, have logically inspired the written contributions as well as the visual representation of the ten issues on the cover of this publication.

In parallel with these issues, 2021 is also likely to be a year of profound reflection on the EU's future through the Conference on the Future of Europe. The President of the European Commission launched the idea of a structured discussion through such a conference in her pre-election statement to the European Parliament in July 2019, encouraging the involvement of both European citizens and their elected representatives as part of a broader renewed impulse of European democracy. This idea was promptly endorsed by the Parliament, which made very precise and ambitious suggestions on the purpose, scope and composition of the conference in its resolution of 15 January 2020. The Commission went on to present its own somewhat less 'ambitious' vision, nevertheless largely converging with that of the Parliament. The Council too, while stressing the importance of the implementation of its Strategic Agenda and the respect of the institutions' prerogatives, later joined the Parliament and the Commission in endorsing the involvement of national parliaments, citizens and civil society. Whilst the coronavirus crisis has delayed the signing of a joint declaration by the three institutions – after which the Conference may start – agreement seems to be close, even if the sensitive question of the Conference's chair remains open.

At the start of this critical year, we hope that you will enjoy reading this latest edition of 'Ten Issues to Watch' and that it will stimulate you to reflection, and ignite your curiosity as you explore the challenges and opportunities of 2021.

### **Étienne Bassot**

Director, Members' Research Service,  
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## 1. The vaccine race for health safety



The vaccine race launched at the outbreak of the global coronavirus pandemic is entering a new phase. As 2020 drew to a close, more and more research teams were announcing successful results of their [phase III](#) clinical trials, with thousands of people participating in them. This has allowed vaccine producers to introduce requests for approval and brought hope that it will help to curb the pandemic. The vaccines will work as life protectors, as well as social and economic life enablers. What is at stake is not only health, but also the way in which future pandemics will be dealt with, long-term public trust in science, and [gradual](#) improvement of the otherwise deteriorating welfare level. Alongside the positive dimension, we might see [disinformation](#) campaigns, often led by [anti-vaccine movements](#), and [supported](#) by foreign powers interested in [undermining](#) others' positions. Some state actors may try to lead a kind of propaganda campaign to [promote](#) themselves and their global agenda. The ultimate goal, however, is to stop the pandemic through efficient and [equitable](#) global vaccine distribution, with a vaccine being shared as a [public good](#).

### EU action on Covid-19 vaccines

#### What is the EU's competence in the area of public health?

According to [Article 168](#) of the Treaty on the Functioning of the European Union (TFEU), while responsibility for healthcare lies primarily with the EU Member States, the EU complements national policies. It [facilitates coordination](#) and generates economies of scale by pooling resources to tackle common challenges. In the coronavirus pandemic's wake, the EU has been moving towards a [European Health Union](#).

The European Commission presented a [strategy](#) on 17 June 2020, to accelerate the development, manufacturing and deployment of vaccines against Covid-19. The strategy aims to secure high quality, safe, effective and affordable vaccines for all in the EU within 12 to 18 months, if not earlier. As [different vaccines will accomplish different things](#) – one vaccine might be better for older or vulnerable populations, while another might be better for the young; one might prevent the spread of the virus, while another might prevent severe illness – the Commission has sought to diversify its vaccine candidate portfolio with different technologies and different companies. To this end, it has entered into advance purchase agreements with vaccine producers on behalf of the EU Member States. In 2020, it concluded [contracts](#) with [AstraZeneca](#), [Sanofi/GSK](#), [Janssen Pharmaceutica NV](#), [BioNTech/Pfizer](#), [CureVac](#), and [Moderna](#). All potential vaccines are [assessed](#) by the European Medicines Agency (EMA) before the Commission grants approval. On [21 December](#), the [BioNTech/Pfizer](#) vaccine, and on [6 January](#) the [Moderna vaccine](#), were given one-year [conditional marketing authorisations](#). These vaccines will be available to all EU Member States at the same time. A joint, coordinated EU-wide [vaccine roll-out](#) started officially on 27 December in most countries.

### Next steps to be taken

Vaccines will be distributed based on population size according to a distribution key [agreed](#) between the Commission and Member States. It is up to the latter to decide who will be vaccinated first – a much debated [ethical conundrum](#), both on a [global scale](#) and for [Europe](#). In an October [communication](#) that complements the June strategy, the Commission presented the key elements to be taken into account by EU Member States for their Covid-19 vaccination strategies. The Commission encouraged countries to put everything in place to be able to deliver and distribute vaccines 'in an ordered manner'. Given the anticipated initial shortage of vaccine doses, it urged Member States to **define priority groups for vaccination**, based on the need to protect the most vulnerable, and to slow down or stop the spread of the disease. It mentions health and care workers, people over 60, vulnerable populations (such as people with chronic diseases), essential workers outside the health sector, communities unable to physically distance, workers unable to physically

distance, and vulnerable [socio-economic](#) groups. The Commission underlined that Covid-19 **vaccination should be made easily accessible and affordable**, encouraging countries to consider providing vaccines for free. It asked the Member States to strengthen their vaccination services, including workforce and supplies, **and to take into account the logistical challenges** linked to specific storage and transport requirements, especially as regards temperature (in some cases as low as [-70 to -80 °C](#)), which would also entail economic costs in terms of specialist equipment and running costs to maintain the cold-chain. It insisted that Member States ensure **clear communication on the benefits, risks and importance of Covid-19 vaccines to build public trust**. **Vaccine hesitancy** is an important aspect not to be overlooked, as the European Parliament underlined in an April 2018 [resolution](#). This is all the more valid in the current context: in an April 2020 [survey](#) on the willingness to be vaccinated against Covid-19 in seven European countries, 74 % of respondents said they would want to have a jab if a vaccine were available, 19 % were not sure, and 7 % stated they did not want to get vaccinated. Monitoring vaccine acceptability, behavioural research, as well as communication plans are also [key components](#) of the European Centre for Disease Prevention and Control's supporting guidance for Covid-19 vaccination. Finally, there is the '[for](#) and [against](#)' in the controversy as to whether vaccination should be made [mandatory](#) in order to obtain the Covid-19 vaccination coverage needed for [herd immunity](#), estimated at up to 70 % of the population.

Not just those companies with which the Commission negotiated contracts developed vaccines. Among the most discussed are [four Chinese vaccines](#) and the Russian [Sputnik V](#). Their development processes were heavily criticised, as they received approval or were widely [distributed](#) before ending phase III clinical trials. The lack of [transparency](#), and previous national vaccine [scandals](#), have led to the vaccines' claimed safety and efficacy results being [questioned](#). Despite that, Hungary [initially](#) declared its willingness to use Chinese and Sputnik V vaccines. While this is [compatible](#) with EU law under certain conditions, the Commission stresses the importance of having the vaccines' efficacy, safety and quality assessed by the EMA, to build citizens' trust.

## Global action against Covid-19

Internationally, the EU is positioning itself as a leader of global solidarity efforts to speed up universal access to vaccines against the coronavirus disease. Under the [Coronavirus Global Response](#) – the global action for universal access to affordable coronavirus vaccination, treatment and testing, launched by Commission President Ursula von der Leyen – almost €16 billion has been raised. The EU and its Member States have also provided more than [€850 million](#) to [COVAX](#), which aims to get wealthier countries to [sign up](#) to help finance Covid-19 vaccines for low- and middle-income countries. This is to provide equitable access for people, regardless of their purchasing power. This approach is considered both [morally justified](#), as well as leading to optimal medical and economic results. It is important to remember that [no-one is safe until everyone is safe](#), as our world is hugely [interconnected](#). It is also [estimated](#) that high-income countries will receive back €4.80 for each euro spent on vaccines supplied to low-income countries. At the same time, the entire global economy would avoid US\$153 billion of annual loss resulting from the pandemic, including US\$40 billion in the EU alone, should low-income countries receive equitable access to the vaccine.

## Challenges ahead

The global operation to distribute vaccines is an unprecedented challenge. The vaccine doses have to be produced without undermining other vaccine production capabilities. The vaccine [transport](#) and [distribution security](#) is the next issue to watch. Once vaccinations start, [extra measures](#) will be taken to monitor possible side-effects. Some scientists advise to [expect the unexpected](#). Not only can production or transport lines temporarily fail, but people may behave less cautiously too early, or the virus may [mutate](#) and become [resistant](#) to vaccine. Also, insufficient numbers of vaccinations may delay any herd immunity effect. The world should be prepared for different scenarios.

## 2. The EU recovery plan: Turning crisis into opportunity?



The EU recovery plan is based on the €750 billion temporary European recovery instrument for 2021-2023, Next Generation EU, and on the €1.1 trillion [EU budget](#) for 2021-2027. This [financial package](#) is the EU's response to mitigate the socio-economic impact of the coronavirus crisis. The year 2021 will be crucial for the launch of the [recovery plan](#). It is time to see it being implemented. Yet, some essential steps remain before it can unfold.

### The EU's largest and most innovative recovery plan

Financed through the EU budget, Next Generation EU ([NGEU](#)) is the largest and most innovative instrument the EU has ever proposed to redress its economy, not only because of the size of the financial support, but also because of the way it will be financed and the link it creates between the recovery measures and the EU's objectives and values.

It is the largest, as it corresponds to almost five times the EU annual budget. It will provide financial support to Member States in the form of both grants (€390 billion) and loans (€360 billion). It is attached to the EU's €1.1 trillion seven-year budget, bringing the total financial 'package' to €1.8 trillion. Overall, the EU's economy will be supported with 60 % additional funds over the next seven-year financial period (2021-2027) compared to the current one (2014-2020). This makes the EU recovery plan an extraordinary response to an unprecedented situation.

It is the most innovative, since its financing is based on a new approach. The Commission will have a new role and, [going beyond](#) the 'principle of budgetary balance', it will be exceptionally empowered to borrow on the capital markets on behalf of the Member States, only for actions to mitigate the Covid-19 impact. To enable the borrowing, the ceiling for financing EU budget expenditure, set out in the [own resources decision](#), will be increased and serve as a guarantee for the borrowing operations. This legislative act requires ratification by all Member States.

Overall, this ambitious recovery instrument [aims](#) well beyond giving relief to the Member States damaged by the coronavirus pandemic. It is designed to put the EU's economy back on its feet through investments and reforms and to improve its resilience, while building a greener and more digital EU. It interlinks the financial support to the progress made towards these objectives set by the EU for the coming years. To receive financial support, Member States must submit [national recovery and resilience plans](#) that both address the country-specific recommendations and set milestones towards climate neutrality and digitalisation. Overall, considering both NGEU and the long-term budget, as agreed with the [European Parliament](#), at least 30 % of the expenditure will contribute to fight climate change, while in addition, the EU's budget will progressively dedicate up to 10 % of annual spending to biodiversity action. Moreover, the new mechanism on the rule of law, means that funding from the EU budget is now also linked to the respect by Member States of the EU's fundamental values ([Article 2](#) of the Treaty on European Union), thus protecting the Union's budget in case of deficiencies.

### What to expect from the recovery plan?

The EU recovery plan is expected to relaunch EU economies while laying the foundations for a better future; and EU citizens expect noticeable results too. The innovative way in which the recovery plan has been constructed might also transform the foundations of the financing of EU policies and the EU budget, if there is the political will to do so.

The Commission estimates that NGEU can contribute by increasing the EU's gross domestic product (GDP) by [around 2 % on average](#) and by creating up to 2 million additional jobs by 2024. For some Member States, NGEU alone could [contribute](#) up to 5 % of domestic GDP. The challenge is to absorb



these [funds](#) and achieve the [full potential](#) the plan can offer to support recovery and [modernisation](#). It is an opportunity not to be missed.

Another opportunity the recovery plan brings relates to the reform of the EU's own resources. The [agreed package](#), in line with the [European Parliament's](#) long-standing request for new own resources, envisages the gradual introduction of new own resources to facilitate the repayment of the NGEU borrowing. The new own resources decision provides, from 2021 already, for a new contribution to the EU budget based on non-recycled plastic packaging waste. Moreover, further resources should be gradually introduced on the basis of a [roadmap](#). These new sources aim to progressively diminish the GNI-based own resource and thus open a new approach to financing the EU budget.

According to some [experts](#), this innovative recovery instrument gives another dimension to the EU's financing. If the EU recovery instrument is implemented with success, it could become a [new way](#) of financing EU policies and a [permanent facility](#) to help the EU face any other potential deep crisis. However, for this approach to become the new way to react to crisis situations, further political debate will be necessary, as there are still diverging views.

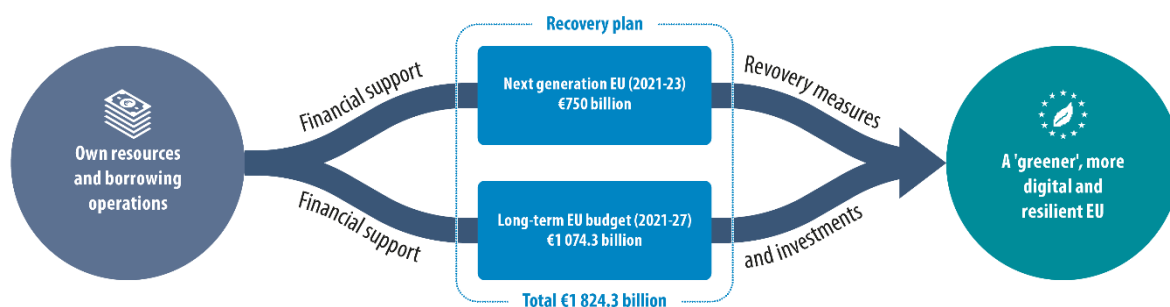
## The remaining challenges

The elements of the EU recovery plan, objectives and mechanisms, are now sketched out. But the launch of this innovative engine still lacks two essential moves.

First, the recent [agreement](#) on all the elements of the financial 'package', including the rule of law provisions, means that ratification by national parliaments of the revised Own Resources Decision can start. Given the current extraordinary circumstances, it is [hoped](#) that all 27 Member States accelerate and complete this process within six months instead of the more than two years it would usually take. This is a necessary step to enable the Commission to borrow, for the first time, the necessary funds on the capital markets and finance the recovery instrument.

Second, Member States are preparing reliable national recovery plans, on how they intend to spend the funds, to be submitted by the end of April 2021 for the Commission's assessment and Council's approval. Governments have [started](#) to draw up these proposals around seven flagship areas, on the basis of the [guidelines](#) presented by the Commission. It is about mobilising the necessary investments and introducing structural reforms under six [European priorities](#). These are the just and green transitions, digitalisation, economic and social cohesion, competitiveness, and increased resilience to crisis. Member States will then be able to launch the investment projects with [13 % pre-financing](#) upon the approval of the recovery and resilience plans, and commit [70 %](#) of the grants at the latest by end-2022. Actual disbursement is conditional upon the fulfilment of the pre-agreed milestones and targets.

Will the EU succeed in turning the crisis of this pandemic into an opportunity by supporting the recovery but also by investing in our future, as European Commission President Ursula von der Leyen has [stated](#)? All this is to watch out for in 2021 and in the years to come.



Data source: author's compilation.

### 3. Food for all? Food for thought



Access to food is a fundamental [human right](#), enshrined in the Universal Declaration of Human Rights and further protected under international and national law. In the EU, it has been a [core objective](#) of the common agricultural policy (CAP) since it entered into force in 1962. The fight against hunger is a prominent objective of the [UN Sustainable Development Agenda](#), and food security is instrumental to achieving 14 of its 17 Sustainable Development Goals ([SDGs](#)). The coronavirus pandemic and the subsequent economic crisis have impacted food chains throughout the world, creating disruption and revealing inherent vulnerabilities and distortions, including in the EU. The crisis could almost [double](#) the number of people suffering from acute hunger in the world, and threaten access to quality and nutritional food for millions of vulnerable EU citizens. It has also underlined the urgency of rethinking the way we produce, trade and consume food, creating the opportunity to raise the level of ambition to reform global food systems. A number of international initiatives will converge in 2021, mustering consensus towards more robust governance in the field. Awarding the 2020 [Nobel Peace Prize](#) to the World Food Programme ([WFP](#)) is seen as a sign of the times: food really matters.

#### The need to reform the EU food system

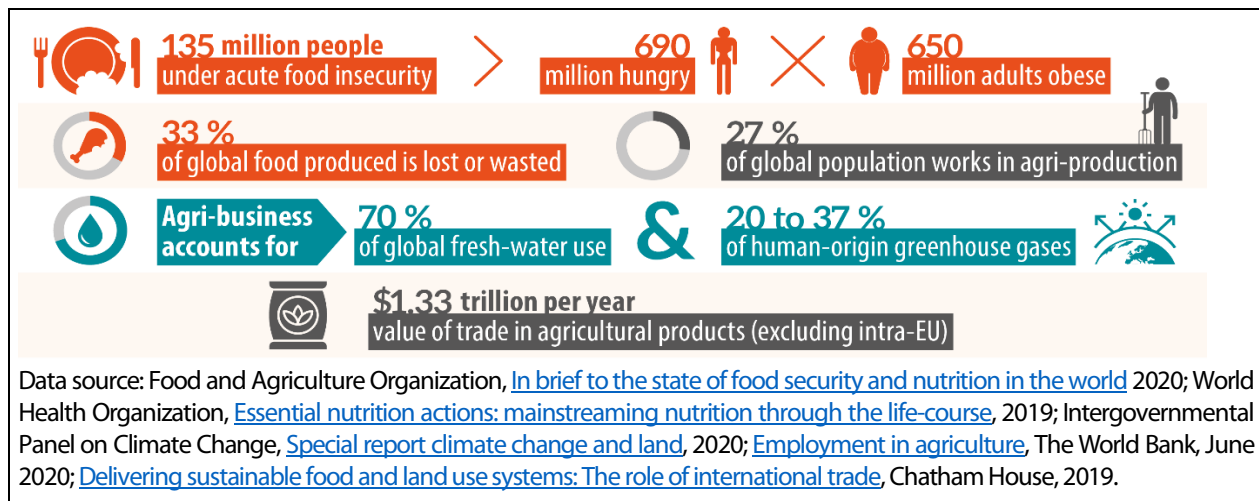
Access to food is not generally considered to be an issue in the EU. Most Europeans enjoy sufficient access to a large supply of varied and good-quality food. The CAP has been instrumental in ensuring food security in Europe by restructuring and modernising agriculture, and increasing its competitiveness. Yet, while the food supply is abundant, before the coronavirus crisis [7.4 % of EU citizens](#) were unable to afford a meal with meat or fish every second day. In some EU countries, large parts of the population have to rely on food assistance.

In 2020, the coronavirus crisis sent shockwaves through the EU food supply chain. National and EU measures taken to contain the spread of the disease, such as lockdowns and the closure of borders, caused an acute shortage of seasonal labour, bottlenecks in the food chain and many other [disruptions](#). The EU food system proved resilient, supported by a host of sectoral, national and [EU policy measures](#). It adapted quickly to address bottlenecks, and the food supply has generally been maintained. However, the disruption has put the spotlight on some structural weaknesses. Food supply chains are mainly long and complex, partly dependent on the global trade environment. Food waste and loss along the chain represent 20 % of total EU food production. Moreover, EU farming is heavily reliant on cross-border seasonal workers – whose frequently appalling working and living conditions were exposed by the crisis. The pandemic highlighted the issue of food insecurity for the most vulnerable in the EU, with [food banks](#) raising alarm about a sharp increase in demand. The economic recession may push millions of EU citizens into poverty, leading to malnutrition – as cheaper food is often less healthy – and health issues such as obesity and diabetes. Finally, ensuring food security in the future means tackling the profound environmental impact of the EU food system, in particular [agriculture](#), which is currently [unsustainable](#).

#### Food security in the world: A goal still far away

The UN [report](#) 'The state of food security and nutrition in the world 2020' offers a gloomy picture of international achievements in fighting global hunger. Current estimates are that, today, nearly 690 million people (almost 9 % of the world population) are hungry. Some [135 million people](#) across 55 countries experienced acute (i.e. life-threatening) food insecurity in 2019. A majority of those were women in Africa. The pandemic and the subsequent global economic recession are having disproportionate effects in vulnerable countries. The number of people experiencing acute food insecurity could reach [265 million](#) in 2021 unless urgent action is taken.

The conclusion of the UN 2020 report leaves no doubt: the world is currently not on track to achieve [zero hunger by 2030](#), and if recent trends continue, the number of people affected by chronic hunger would surpass 840 million by 2030. Although exacerbated by the pandemic, the profound imbalances and distortions inherent to the current global food systems were present well before.



## Towards sustainable food systems

The coronavirus crisis and the shocks sustained by food supply chains in the EU are a wake-up call. It is now urgent to achieve the transition to a more resilient agri-food system, providing affordable and healthy food to all EU citizens. This means making it sustainable in social, economic and environmental terms. It should also be fair for all stakeholders, from farmers and farm workers to consumers. As part of the [European Green Deal](#), the [Farm to Fork strategy](#) aims to accelerate this shift. It envisages future legislation on a framework for a sustainable food system that will mainstream sustainability in all food-related policies. A contingency plan for ensuring food supply and food security will also be developed by the end of 2021. The reformed CAP, to be adopted in 2021, has the potential to deliver on the Farm to Fork strategy. But beyond the agri-food system, ensuring food security for all requires addressing the issue of poverty and malnutrition that the economic crisis will exacerbate. The [recovery plan](#) designed to repair the economic and social damage caused by the crisis could help Member States strengthen social safety nets and protect livelihoods for the most vulnerable. At the global scale, the international community needs to take urgent action to avoid an unprecedented famine crisis in the most affected countries. The [Food Coalition](#), convened in May 2020 and led by the Food and Agriculture Organization (FAO), aims for unified global action in response to the world food crises in the aftermath of the pandemic.

Crisis interventions will not, however, address the profound distortions and imbalances in the way we produce, trade and consume food. These are hampering the achievement of the zero hunger objective by 2030 and condemning millions of people to chronic hunger in the years to come. The coronavirus crisis has created the opportunity to raise the level of reform ambitions for global food systems necessary to tackle the [triple challenge](#): to **feed** a growing population, to **protect** agri-food related livelihoods, and to **preserve** the natural resources at the base of food production. A number of international initiatives are on-going, galvanising efforts to reinforce global governance in the field. The [UN 2021 food systems summit](#), scheduled for September 2021, is setting a bold agenda with a view to transforming food systems as a crucial step for delivering all the [SDGs](#). The summit will bring together governments, corporate business, academia and stakeholders, and aims to promote systemic changes in areas such as land-planning, digital economy, positive trade incentives, innovative farming and changes in diets. The EU is well positioned to take a prominent role in the debate, turning into action the international cooperation aspects of the [European Green Deal](#) and the Farm to Fork strategy. The [Council](#), which has called for an ambitious set of goals for the summit, will put forward its key political priorities in conclusions to be adopted in spring 2021.

## 4. Re-invigorating the fight against inequality?



The question is not 'do inequality and discrimination exist in Europe?', but rather how can we, as individuals and societies, recognise and fight them more effectively? Research by the European Union's [Gender Equality Institute](#) (EIGE) and [Agency for Fundamental Rights](#) (FRA) shows that, despite efforts to reduce them, discrimination and inequalities on multiple grounds, including sex, age, ethnic origin and skin colour, disability, sexual orientation, gender identity, religion and belief, and migration status, remain pervasive. A large percentage of the EU population feel and are discriminated against in their everyday life, in education and employment, as well as in access to housing, healthcare and justice, public and private services, neighbourhoods and private relationships, because of who they are. Many experience overlapping '[intersectional](#)' forms of discrimination. For instance, a black woman with disabilities may face a combination of racism and discrimination based on her gender and disability. Many even fear for their lives and safety as they are at disproportionate risk of falling victim to harassment and hate crime. Discrimination and attacks often go unreported and many of those that do report have low levels of satisfaction with how their complaints were handled. A [2019 Eurobarometer](#) shows that public awareness of this situation and positive attitudes towards the groups at particular risk of discrimination have increased since 2015, but with significant variations between countries and for particular groups. Only a quarter of respondents felt that their country's efforts to fight all forms of discrimination were effective.

### Why discrimination and inequality matter, especially now

The rights to equal treatment and non-discrimination are enshrined in the Treaties, the Charter of Fundamental Rights, and [EU legislation](#), which are binding on all EU Member States, making them core values and a matter of social and economic justice. The EU and its Member States have also [committed](#) to reduce inequalities in income and those based on protected grounds, and to promote social, economic and political inclusion for all. Failure to protect these fundamental rights and commitments has corrosive impacts for individuals and societies. Discrimination affects individual safety, wellbeing, mental health, earnings and potential, drives inequality and erodes [social cohesion](#) and [trust](#) in political institutions. Recent [EPRS research](#) also estimates that in economic terms, ineffective national implementation of EU equality law and gaps in current EU legislation are costing billions of euros in lost gross domestic product (GDP) and tax revenue.

The pandemic and related events have [exposed](#) the inequalities and discrimination already faced by some groups in society. Measures introduced during the pandemic have led to strong public [protests](#) in countries already experiencing an erosion of women's rights and LGBTI equality. Police brutality in the USA has [sparked](#) Black Lives Matter movements spotlighting structural [racism](#) in Europe. The pandemic is also [exacerbating](#) the risk and incidence of gender-based violence, racism and xenophobia, vulnerability of LGBTI and homeless people, migrants and prisoners in the EU. Evidence that risks of transmission and severe illness are [correlated](#) with existing inequalities such as higher levels of deprivation, poor housing, underlying health conditions, barriers to health care, and occupational inequality, makes the stakes even higher. A lack of disaggregated data makes it difficult to assess how this intersects with protected grounds, but data from the UK show that groups at greatest risk of contracting and dying from Covid-19 include [black and ethnic minority groups](#) and [people with disabilities](#). Looking to the immediate future, there are [considerable risks](#) of progress towards equality going into reverse due to the economic and social fallout from the pandemic. There is also a risk that economic insecurity could lead to further populist backlashes and rises in [hate crime](#). In the long-term, [digitalisation](#), the development of [artificial intelligence](#), the [green transition](#) and other emerging trends bring potential for more inclusion but also for exacerbating or generating new forms of inequality.

## A renewed impetus for the EU response to inequality

At EU level, [extensive action](#) has been taken to fight discrimination and promote equality, but more remains to be done. Current EU legislation [does not provide](#) the same level of protection against discrimination to all vulnerable groups in all spheres. There are no common standards for combating violence against women and hate crime. Existing legislation and broader efforts to fight discrimination have also been criticised for failing to address some forms of discrimination. While protections are largely based on separate grounds, such as gender, race, age, ethnicity, or disability, they do not take account of concurrent forms of discrimination, which require a different, intersectional approach. Taking better account of multiple and [intersectional discrimination](#) could help to achieve substantive equality at a systemic level by addressing the structural mechanisms that reproduce inequalities.

The von der Leyen Commission has placed the issues of equality and inclusion high on its political agenda. For the first time, there is a [Commissioner for Equality](#), Helena Dalli, whose brief is to strengthen Europe's commitment to equality for all, by ensuring full implementation of the existing EU anti-discrimination legislation and proposing new legislation and policies. The commissioner also coordinates a new internal task force, intended to ensure a joined-up approach to equality across the Commission and mainstreaming in all EU policies. The Commission has begun to adopt a series of multiannual equality strategies and action plans, including strategies for [gender equality](#), [LGBTIQ equality](#), [victims' rights](#), and [application of the Charter of Fundamental Rights](#); action plans on [integration and inclusion](#) and [combating racism](#) and a framework for [Roma inclusion](#). A new strategy on the [rights of persons with disabilities](#) is scheduled for 2021. The adoption of these policies, which are to be interconnected, and the attention within them to the needs of specific groups, signals a shift towards the new 'intersectional' approach to tackling discrimination and inequalities at EU level, supported by the European Parliament.

## 2021: The year for putting plans into action?

In 2021, the Commission intends to [shift](#) from strategy to delivery and the spotlight will fall on the concrete challenges of implementing these measures and bringing about real change. Stakeholders are watching with cautious optimism to see what can be achieved in the context of the pandemic and its aftermath and the longstanding difficulties of legislating and enacting change in this policy area. The Commission's [2021 work programme](#) is explicit about the intention to use the crisis as a catalyst for a transformative economic and social agenda, with the new equality strategies as a central plank. It has also promised to ensure that the looming economic crisis will not become a social one. However, past crises and experiences with [gender mainstreaming](#) illustrate that equality policy can be perceived to clash with other priorities. An equality perspective can easily end up being marginalised or overlooked if it is not factored in from the outset and monitored by means of clear targets, impact assessments and dedicated funding. One obstacle is the lack of [disaggregated equality data](#) crucial to design effective policy and track outcomes, [particularly](#) for racialised and ethnic minorities, since [many countries](#) are reluctant to collect this data. [Researchers](#) have also raised questions about EU institutions' capacity to ensure that equality is prioritised and mainstreamed.

Past experience has shown that progress in the area of equality and diversity is very slow. The level of support for passing new legislation on [pay transparency](#), [hate crime](#) and [violence against women](#), and unblocking stalled proposals, remains to be seen. Here, one key example is the [anti-discrimination directive](#), proposed in 2008 to close the existing gaps in protection from discrimination. Despite numerous efforts, this directive has not yet been adopted, as it requires unanimity in the Council, something that is challenging to achieve in this policy area, which has become a focal point for disagreements over EU competence and values. Moreover, adopting legislation at EU level is no guarantee of success in removing discrimination. In this sense, there is only so much that the EU can do; successful implementation falls on the Member States and the capacity of institutions and people to make changes in systems, attitudes and behaviour.

## 5. Culture in crisis?



Culture in general, and the arts in particular, create relationships and help us interpret and give meaning to our lives and the world around us. As such, they play an important role in our social relations, general wellbeing and [health](#), especially mental health, even underpinning certain therapies. While such factors are not included in the calculation of gross domestic product (GDP), Canada recently introduced culture into its [wellbeing index](#). This covers time and money spent on arts and culture, attendance at live performances, and volunteering for culture, thus acknowledging the importance of an often under-valued area.

Artistic processes enrich our experiences but not necessarily the artists themselves, whose jobs are [precarious](#) and often poorly paid. While cultural and creative sectors employ [3.7 %](#) of workers across the EU, cultural jobs, artistic ones in particular, account for twice as many freelancers as in the rest of the economy and offer low levels of social protection. This, together with the tendency to have to follow project-based career paths, means that many workers in the cultural sector have an uncertain future.

### Coronavirus and the cultural and creative sectors

The Covid-19 pandemic has exacerbated this precarious situation in areas such as live performances and art exhibitions, which are among the first events to close during lockdowns and the last to re-open, even under very strict sanitary conditions.

The pandemic initially hit densely populated places, which is why urban areas were the first to have to [address the challenges](#), innovate and experiment to keep culture vibrant. Working with the EU, national and regional authorities, cities also provided various [support schemes](#) to limit the harm to artists, who can easily fall through the unemployment rescue nets.

Scientists warn that the current crisis will not be an [isolated incident](#). Moreover, nobody can predict how long the current situation will last. Artists and cultural operators, like so many, have little choice but to adapt their activities to the new conditions. In particular, the cultural and creative sectors, and especially those dealing with live performances, will need to make digital adaptations to enable and promote remote participation, as well as practical adaptations to allow for safe physical attendance.

### Coronavirus – Accelerator of change; Culture – Factor of recovery

Sanitary restrictions that limit occupation of cultural venues to between 25 % and 50 % of normal capacity, mean a reduction in access to live performances and in the financial viability of cultural activities. While [cost](#) was already a barrier to accessing culture before the pandemic, physical participation is now likely to become even more expensive. Private spending on culture will also [drop](#) significantly due to economic hardships resulting from the shocks to the economy. This could lead to a downsizing of the sector, a reduced cultural offer, and an impoverishment of [cultural diversity](#), as venues, museums and galleries close, and creative professionals move to other sectors.

That said, access to culture over the internet has offered an important contact point during lockdown periods. Although some artists may be unable or unwilling to digitalise their offer, many others have been making their productions available [online](#) without charge, in order to provide [psychological comfort](#) to their audiences and to keep their relationship with their public alive. Even if the plethora of online offerings can lead to digital fatigue, and while artists and their audiences may miss the magic of the physical encounter, and would like to see venues open again, costs and sanitary concerns may be difficult [barriers](#) to overcome for many.

Hybrid events (combining a limited physical audience with paid for live streaming), as proposed by some concert halls and theatres, are an alternative to online-only events and provide some

revenues. Beyond the pandemic, digital applications are now available to improve the experience in certain seats with limited visibility. Digital technology also offers an opportunity to attract new or younger audiences to theatres and other cultural venues.

The lockdowns have accelerated efforts and reflection on digital transitions in many spheres, even in cultural activities. Recently, [G20](#) culture ministers called for a new paradigm, forging more sustainable societies and economies. On that occasion, Unesco's Director General, Audrey Azoulay, stated that culture must be central to the recovery efforts, since it is an overarching need, underpinning all aspects of our societies. She defines it as a [purpose, not a cost](#).

## EU perspective on cultural recovery

EU competence in cultural policy is limited to support, but this can take different forms and apply in a variety of areas. For example, artists and performers can be supported by an EU-funded scheme established to mitigate unemployment risks in an emergency ([SURE](#)). Biological and technological research and innovation funded by the European research programme could help to define safe protocols for events and so gain public trust. In this respect, progress has already been made in understanding the indoor airflow conditions necessary for live performances and big events, as was done in the [Leipzig Arena](#) and [Salzburgerfestspiele](#), for example.

Support for research and innovation projects, combining arts and technology or climate and energy efficiency, could help projects to renovate old cultural venues, upgrading their ventilation and air conditioning systems, for instance, and making them more sustainable. The [new European Bauhaus](#) initiative could contribute to achieving this goal while creating synergies between arts and technology and cooperation amongst artists. European Commission President, Ursula von der Leyen, presented this project as a bridge between the world of science and technology and the world of arts and culture. It focuses on environmental issues, with [artists](#) contributing to raising public awareness about climate change.

In a [resolution](#) of 17 September 2020 on the cultural recovery of Europe, the European Parliament called on the Commission and Member States to earmark at least 2 % of the [Recovery and Resilience Facility](#) for the cultural and creative sectors and industries. The Parliament also wants to ensure that EU support to mitigate unemployment risks in an emergency (SURE), intended to help fund short-time working measures, also covers artists, freelancers, and micro-organisations, which are predominant in the cultural and creative sectors.

Whatever 2021 will bring for the sector, [recent data](#) point not only to a drop in revenues from live performance by musicians due to lockdowns, but also a reduction in the royalties generated through the playing of 'background' music in public venues such as restaurants, bars and hotels. This is yet another trend to watch for live performances, since such usage accounts for 19 % of royalties collected by European authors' societies, making it possible for musicians to go on stage.

## Will performing arts just survive or is there a possibility to thrive?

In 2021, we will see how efficient the various measures have been: how many artists and performers will quit, and how many state-supported and private venues and festivals will manage to survive two or more lockdowns. State support and private donors, not just big single donors but also crowdfunding of live performers and other artists, will be crucial and a gesture of recognition to all the creative minds that brought some light into homes when cultural venues were closed. Among the most important results we could see new talents that emerged online being able to engage professionally on stage, and new models bringing in revenues for live performances and paid online content that makes it possible for artists to develop their creativity and live from their art. Covid-19 related lockdowns may result in the longer term in new artistic projects and experimental social engagement in cultural venues, building new connections between people.

## 6. A digital boost for the circular economy



Two key global transitions are on-going – a continuous digital revolution, and an urgent transition towards climate neutrality and environmental sustainability. The EU strives to lead in both. The political guidelines of Commission President Ursula von der Leyen set out a programme for 'the transition to a healthy planet and a new digital world'. This is confirmed in the [legislative priorities for 2021](#), with 'implementing the European Green Deal' and 'shaping Europe's Digital Decade' listed among the six key priorities.

### Circular economy

A [circular economy](#) is a key component of the European Green Deal. In a circular economy, products stay in use longer (through sharing, repair and reuse), and materials are reused over and over. A circular economy would reduce environmental damage from resource extraction and production of materials, make Europe less dependent on imported materials and decouple economic growth from the input of new material resources. There is growing recognition that a circular economy will help to address the triple challenge of resource scarcity, environmental impacts and waste. The EU's [new circular economy action plan](#), adopted in March 2020, features a sustainable products initiative to support the circular design of products, focused on resource-intensive sectors, including electronics and information and communication technologies, as well as a new European data space for smart circular applications with data on value chains and product information.

### Digital technologies for sustainability

Digital technologies have transformed all sectors of the economy and the daily lives of workers and citizens. Physical goods, such as newspapers, are being replaced by online content. Digital equipment is becoming cheaper, smaller, more powerful and more energy-efficient, with performance [doubling](#) roughly every two years. This trend is expected to continue accelerating with the growth of artificial intelligence, smart homes, and self-driving vehicles, to name just a few examples. The [Digital with a purpose](#) roadmap of the industry-led Global Enabling Sustainability Initiative outlines the contribution of digital solutions to the achievement of the UN Sustainable Development Goals. Digital technologies have already shown their value in the energy system: [smart grids](#), smart meters and smart appliances help to match electricity demand with supply, and integrate renewable energy sources into the grid. In contrast to the good progress in applying digital tools in energy, the [potential](#) of digital solutions to design and manage a circular economy is only now starting to be explored.

### Digital solutions to support the circular economy

Digital technologies can play a key [enabling role](#) in the transformation towards a circular economy. In the [product design](#) phase, they can help design products that can be repaired, upgraded, and disassembled and recycled after their useful life. In the phase of product use, they can enable the sharing of products ('[product as a service](#)'). The use of mobile apps for finding and accessing [shared vehicles](#) is a typical example. In the phase after product use, digital technologies can help the reuse of the product or its components and the recycling of materials. Digital technologies, such as [blockchain](#), can play a critical role in tracking the materials over the lifecycle of a product. The EU circular economy action plan aims to introduce an electronic product passport with information on composition, repair and dismantling possibilities. In addition, entirely new [business models](#) could emerge where the raw materials, components and products remain in the ownership of the producer, who collects a payment during their use, and they are returned to the owner thereafter.



Moreover, digital technologies can help design and manage complex circular industrial ecosystems, in which the waste of one production process becomes a valuable input to another process, based on the principle of [industrial symbiosis](#), for example by using captured CO<sub>2</sub> as a chemical feedstock.

#### Examples illustrating the potential of digital solutions

In the food system, [mobile apps](#) help retailers sell left-over food that would otherwise be wasted. [Artificial intelligence](#), sensors and robotics have been used to improve sorting and separation of waste for recycling. Smart household appliances or industrial equipment connected to the [Internet of Things](#) can determine when they need to be repaired or maintained, signal any problems and schedule their own maintenance.

## Digital technologies: A challenge for circularity

Despite the great potential of digital technologies for enabling the circular economy, electronic and digital products pose major challenges for the move towards a circular economy. Miniaturisation, ever-growing complexity and an accelerating speed of innovation enable digital devices and services with unprecedented capabilities, but at the same time make repair, upgrade, reuse and recycling more difficult. For example, a [smartphone](#) contains a large number of valuable materials, but at such tiny scales that the separation becomes extremely challenging. Although digital devices have become more efficient, [material use and energy consumption](#) continue to grow because the exponential growth of applications, computing power and bandwidth outpaces any efficiency improvements; see, for example, the energy demand of [data centres](#) or [bitcoin mining](#) operations. Faster lifecycles for consumer electronics lead to products becoming obsolete after a few years and an ever-growing amount of [e-waste](#) in the EU, of which less than 40 % is currently recycled.

#### Consumer electronics in the circular economy

So far, there are only a few initiatives to design consumer electronic devices with circularity in mind. A well-known example is the [FairPhone](#), a smartphone made from sustainably sourced materials and designed to be repairable and easy to upgrade by replacing components such as the camera.

[Smart batteries](#) with a built-in battery management system play an ever-increasing role in the digital and green transition at all scales, from tiny batteries for smart watches to grid-scale batteries that help integrate fluctuating renewable energy sources in a climate-neutral electricity system. Batteries in electric vehicles enable zero-pollution mobility and can help to [balance](#) the electricity grid. Boosting the production, reuse and recycling of batteries in the EU is seen as critical to the success of the energy and clean mobility transitions. On 10 December 2020, the Commission proposed a [revision of the EU Batteries Directive](#), with the aim of introducing sustainability requirements and improving collection, treatment and recycling of waste batteries and ensuring materials recovery. The broader [circular electronics initiative](#), to be launched in the fourth quarter of 2021 as part of the new Circular Economy Action Plan, aims to promote longer product lifetimes, establish a right to repair, and improve the collection and treatment of e-waste. The European Parliament supported the right to repair in its November 2020 [resolution on a more sustainable single market](#).

## The digital revolution – A model for moving to a circular economy?

Digital technologies have enabled a wave of industrial, economic and social innovation. They have completely changed the way we work, consume and communicate over the course of just a few years. This rapid development may serve as a model for accelerating the urgent transition towards a sustainable circular economy and inform the design of policies to promote a circular economy, without restricting the potential for innovation in circular and digital technologies. A speedy transition towards a digital circular economy is vital for reducing the EU's dependence on imported materials, achieving long-term sustainable prosperity while minimising climate impacts and environmental damage. If successful, a digitally empowered circular economy can contribute to the EU's strategic autonomy and help ensure a leadership role for European industries.

## 7. Critical raw materials for Europe



Lithium and cobalt (used in rechargeable batteries) or indium (used in touch screens) are 'critical raw materials' (CRMs) for the EU. The 30 CRMs combine two [characteristics](#): they are strategically important for European industry and the economy, and there are high risks associated with securing their supply. While the challenges related to ensuring the availability of CRMs have been on the EU agenda for many [years](#), and the current Commission had made it one of its priorities in 2019 already, it was the sudden disruption of global supply chains by the coronavirus crisis that delivered a resonating wake-up call. With almost half of the world under [lockdown](#), many international logistics networks ground to a [halt](#). This has brought to public attention the issue of the European economy's heavy dependency on global suppliers and made securing a sustainable supply of CRMs more important than ever.

### Why they are critical

Firstly, these materials are widely used in key industries as well as in important and future-oriented value chains, which are essential for ensuring long-term competitiveness and jobs in Europe. In particular, they are fundamental to further progress in [strategic sectors](#) such as digital technologies, renewable energy, electric mobility, defence and aerospace.

Secondly, the EU is highly dependent on importing these materials from third countries, where they are often highly concentrated geographically. For example, 2020 [figures](#) showed that the EU depends on China for 44 % of its supply of all CRMs, while in the case of the rare earth elements – used in high-tech products, such as electric vehicles and wind turbines – this figure jumps to 98 %. Only three CRMs are more than 50 % sourced from the EU. The risks are compounded by the fact that some of the CRM sources are located in politically and/or economically unstable parts of the world. For instance, the Democratic Republic of Congo, one of the world's poorest and perpetually conflict-torn countries, is the source of 68 % of the EU's cobalt. Sometimes, even if there is a source in the EU, the processing takes place abroad. Building CRM value chains is complex and may take a long time – creating such a chain for rare earth elements, for example, may take up to 15 years. Furthermore, to a large extent, there are currently no viable substitutes for these materials.

### The bigger picture

CRMs are becoming a fundamental prerequisite to achieving the main goals of the EU. An increasingly challenging geopolitical [environment](#) is rightly being addressed by a strategic shift in the EU policy towards [autonomy](#). However, the EU will not become a stronger geopolitical player on the global stage without safe and sufficient access to CRMs. This is because they are needed to produce high-tech and high value-added products and develop key technologies fundamental to achieving economic, digital, and defence [sovereignty](#) in Europe.

This strategic drive for the EU, often labelled as increasing 'resilience', does not mean [protectionism](#) but rather, as Internal Market Commissioner [Thierry Breton](#) put it: 'having choice, alternatives, competition. Avoiding unwanted dependencies, both economically and geopolitically'. In the context of CRMs, this means 'open strategic autonomy'. On the one hand, the EU needs to strengthen its domestic supply through both the development of mining for primary CRMs and enhanced [circularity](#) to obtain secondary CRMs. There is a large potential here: Europe has substantial and diversified [CRM reserves](#) to be explored and currently recovers less than 1 % of CRMs from [waste](#) electrical and electronic equipment. On the other hand, given the vast scale of its demand for CRMs, the EU must forge sustainable strategic partnership with resource-rich third countries and integrate those which are interested more tightly into European value chains.

Another crucial goal of the EU, which depends on access to CRMs, is its twin – green and digital – transition, which is one of the main ambitions of the current policy cycle. This was highlighted before the coronavirus crisis in both the [European Green Deal](#) and in the new [industrial strategy](#), for instance. The [European Parliament](#) supports bolstering this dual transformation with a holistic approach linking all elements of the value chain: mining, recycling, smelting, refining and transformation, and the development of an integrated ecosystem for the whole range of materials, metals, and minerals, which goes beyond CRMs. This means that the existing gaps and vulnerabilities in raw material supply chains need to be thoroughly addressed. When the virus hit Europe, the twin transition of economy and society gained even more importance, as it formed the core of the long-term EU [response](#). The CRMs play an enabling role in the planned recovery from the pandemic. They are essential for successfully taking both paths out of the crisis: they underpin all the digital technologies as well as those required for the green future of the EU such as solar panels, wind turbines and electrical batteries. Indeed, Commission President von der Leyen's [call](#) for 'building a resilient, green, and digital Europe' cannot be answered without systematically resolving the issues of CRM supply. However, in its transition to a low-carbon economy, the EU should avoid replacing its reliance on fossil fuels with reliance on CRMs.

## 2021: Putting ideas into practice

Following the September 2020 announcement of a series of [measures](#) designed to increase the security and sustainability of CRM supply, 2021 will be the year when EU efforts kick in on many fronts. Importantly, the [European Raw Materials Alliance](#), established in October 2020 with the purpose of addressing the gaps in existing supply chains and overcoming the shortages of technologies, capabilities and skills, will start to make its mark. In a first phase, the Alliance will work on stepping up urgently needed resilience in the rare earths and magnets value chains, as well as in raw materials for energy storage and conversion. It will then move to other materials, identify barriers, opportunities and investments, and bolster innovation and infrastructure. In 2021, the first projects will be evaluated and the [implementation phase](#) will commence.

The EU will also launch research and innovation activities to improve circular and sustainable use of resources, focusing on waste processing (to obtain secondary CRMs), substitution of CRMs with non-critical materials, and developing advanced materials. This will be financed through EU multi-annual funding programmes and national resources. Also in 2021, a mapping exercise will be launched to identify possible supplies of secondary CRMs from European stocks and wastes.

In addition, the EU will step up its efforts to increase domestic sourcing of CRMs. This will be done through identifying mining and processing projects, investment needs and financing opportunities, while minimising their impact on climate and the environment. The aim is to make the first projects operational by 2025. Coal-mining regions will be prioritised and the EU will support regional development of CRMs, transfers of existing mining and engineering skills and, wherever possible, changing from coal to CRM exploitation and [recovery](#). Helpful EU instruments include the [Just Transition Mechanism](#), the [InvestEU programme](#) and the [European skills agenda](#). To accelerate the deployment of new projects, [Horizon Europe](#) will start in 2021 to research the processes for exploitation and processing of CRMs with reduced environmental impacts. In parallel, the Commission will help with facilitating national approval procedures while maintaining current high environmental standards. Another interesting possibility comes with using the EU earth observation programme, [Copernicus](#), and the technology it offers, such as [remote sensing](#), to find new CRM sites. By the end of 2021, the Commission will also develop criteria for [sustainable finance](#), guiding public and private investments in the mining, extractive and processing sectors.

Since the demand for CRMs cannot be fully met using domestic sources, the EU will focus on improving its access to global markets. In 2021, it will forge pilot strategic partnerships with Canada, interested African countries and the EU's neighbourhood. This will go hand in hand with promoting responsible mining abroad through new [legislative proposals](#) to be tabled in 2021.

## 8. A new procedure to manage Europe's borders



In September 2020, the European Commission presented a [new pact on migration and asylum](#), aiming to better integrate EU policies on migration, asylum, border management, and external cooperation on migration, and to finalise the reform of the Common European Asylum System (CEAS). One key [proposal](#) in this package concerns the establishment of a new border procedure to swiftly identify third-country nationals who are not authorised to enter the EU, and to channel them towards asylum or return procedures.

### Long-overdue reforms

In 2016, the Commission put forward a [package](#) of proposals to reform the CEAS. Despite making progress on several aspects, the Member States could [not agree](#) on a number of key issues, such as the proposed corrective relocation mechanism, and mandatory asylum border procedures. In the meantime, more progress was achieved on a series of measures aimed at strengthening the management of external borders. Most of these measures, however, are still to be fully implemented to produce notable effects.

The new pact builds on, revises, and expands previous proposals in an effort to break the deadlock on the reform of the CEAS. Despite a significant [drop](#) in the number of people arriving at EU external borders, as compared with 2015 figures, [deficiencies](#) continue to affect EU asylum and migration policies. This is exemplified by the persistent backlogs in processing applications for international protection, overcrowded reception facilities at the EU's external borders, recurrent [allegations](#) of illegal border practices, including push-backs and fundamental rights violations, and consistently low rates of return of rejected asylum applicants and irregular migrants. The coronavirus outbreak in 2020, and the related containment measures adopted by Member States, have temporarily reduced the flow of people across the external borders. However, this has [exacerbated](#) challenges related to delivering protection to people in need and to securely managing the borders. Deficiencies at external borders also affect the functioning of the Schengen area of [free movement](#).

### The promise and perils of border measures

The new pact proposes a comprehensive approach that links different aspects of asylum, migration and border management. One key premise of this approach is that a sustainable migration and asylum system requires the effective control of the external borders, and in particular measures to fight irregular migration and improve returns. According to the Commission, the proposed screening procedure at the external borders would ensure that persons who do not have a *prima facie* right to enter the EU are dealt with quickly, effectively, uniformly, and locally.

The preliminary health check component of this procedure is a timely addition to the Schengen rules on border checks. Equally commendable and timely is the proposed independent mechanism to monitor human rights violations in the context of the external borders. Notwithstanding the Commission's efforts to address the complex issues while keeping in mind major political [sensitivities](#), the pact has been generally greeted with scepticism. Members of civil society organisations and academic commentators have broadly criticised the 'comprehensive' pact for being [biased](#) towards restrictive measures and for [blurring](#) the distinction between asylum and irregular migration. A first objection is that the proposed approach is not fully grounded in a systematic assessment of existing shortcomings. It is argued that a managerial-style focus on more efficient procedures and stricter rules [ignores](#) the reality on the ground. In the context of the asylum procedures, for example, there is ample [evidence](#) that border procedures are generally ineffective and conducive of lower protection standards. The lack of European Commission impact assessments for any of the proposals fosters such criticism.

A second objection is that the proposed solutions are unlikely to improve the situation and that their impacts on border management, asylum, and return will likely be limited if not adverse. Indeed, despite being [presented](#) as 'a mere information-gathering stage', the border screening may have unwarranted [effects](#) on asylum procedures. Moreover, the broad margin of discretion left to the Member States on how to carry out checks, including preliminary medical and vulnerability checks, and on the use of detention, could aggravate existing problems at the external borders.

The swift routing of pre-checked persons, who are not authorised to enter the EU and who do not apply for international protection, towards the return procedure is intended to make the return process more efficient. A number of other measures in the new pact (e.g. the joint issuance of return decisions and of decisions rejecting applications for international protection, and sponsorship return procedures) are expected to contribute to this. The problem with return measures is that their [effectiveness](#) depends largely on cooperation with third countries. However, most third countries have so far been [reluctant](#) to cooperate on returns, given the domestic political and economic [costs](#) of such cooperation. Whereas the new pact would make a prominent point about cooperation with third countries on migration and return, it seems to prioritise [coercive](#) measures while offering little additional incentives (for example, no concrete proposals on legal migration pathways).

## What to expect in 2021 and beyond?

In October 2020, the German Presidency of the Council prepared a discussion [paper](#) in view of reaching a political understanding on the key aspects of the new pact by the end of the year. This ambition seemed to have been toned down by mid-November, when it circulated a draft [progress report](#) instead. Perhaps unsurprisingly, the pact reignited an old dispute between Member States [opposing](#) mandatory solidarity schemes (especially relocation) and those [requesting](#) more solidarity to alleviate the burden on frontline countries. The proposal for a new border procedure seems less controversial and generally supported by Member States, although questions remain about its details and practical benefits. Whereas the European Parliament has not yet adopted its position on any of the proposals included in the pact, initial reactions from a number of Members have been [mixed](#). The Parliament has long [demanded](#) more structured solidarity and fair sharing of responsibility in the area of asylum. It has also urged the provision of adequate technical and financial resources to Member States of first arrival 'to enable the swift and effective registration and referral to the competent authorities of all migrants arriving in the Union with full respect for their fundamental rights'. The issues of fundamental rights safeguards and resources are likely to come back onto the table when the Parliament discusses the proposal on border screening.

The Commission's package approach may be [instrumental](#) for facilitating compromise, although, as the experience of the 2016 CEAS package shows, success is not guaranteed. The negotiations on the pact will be complex and may be further delayed by new linkages with future proposals. Progress may also be affected by the pace of the implementation of other measures on external borders, such as the upgrade of Frontex's mandate and the roll-out of the European integrated border management system. Finally, a consensus built around fighting irregular migration, improving border management and boosting returns may help a move in the right direction, although it is not clear if this would be enough to avert future crises. If current trends continue, the number of refugees and migrants worldwide is likely to rise in the future (the number of refugees [doubled](#) in the last decade, reaching 20.4 million in 2019). The profound economic impact of the [coronavirus pandemic](#), which it is feared could undo the gains made against poverty in the past two decades, may create another source of instability that could trigger large migration, including onward [movements](#) of refugees from developing to developed countries.

A future-proof migration policy for Europe would require both taking stock of past experiences, and anticipating broader challenges and long-term needs, such as further tackling [interdependencies](#) between migration and public health, and addressing demographic challenges in Europe.

## 9. Turkey and stormy waters in the eastern Mediterranean



Since the discovery of offshore natural gas reserves in the eastern Mediterranean in the early 2000s, Turkey has [challenged](#) its neighbours with regard to the delimitation of their exclusive economic zones and destabilised the whole region through its illegal exploration and military interventions, in violation of international law. Ankara has used [military force and intimidation](#), including repeated violations of the territorial waters and airspaces of neighbouring countries, as well as bilateral deals, such as its November 2019 [memorandum of understanding](#) (MoU) with the Libyan Government of National Accord (GNA), which purports to determine new maritime boundaries. The international community has strongly condemned Turkey's behaviour. Taking into account Turkey's poor track record in upholding human rights and the rule of law, the European Union has suspended accession negotiations and pre-accession funds under the multiannual financial framework for 2021-2027. If Turkey continues its provocative behaviour, the EU has the option to suspend modernisation of the EU-Turkey Customs Union – which has been under discussion since 2015 – and also to decide to widen sanctions, including new tariffs on selected products such as steel.

### Geopolitical and economic fragility of Turkey

Tensions in the Aegean Sea and the [eastern Mediterranean](#) have not been conducive to good neighbourly relations. The Turkey-Libya MoU on delimitation of the maritime jurisdiction areas in the Mediterranean effectively drew a dividing line between the eastern and western parts of the Mediterranean, threatening maritime security, natural gas exploration and new infrastructure such as the EastMed pipeline. Turkey's behaviour in the neighbourhood, beyond its geo-economic interests, reflects internal political and economic fragility and a broader shift towards nationalistic policies. Some observers suggest that the more ambitious '[neo-Ottoman](#)' agenda is intent on remodelling the whole region by spreading political Islam and the country's influence, from northern Iraq and Syria to Libya, leaving behind the Kemalist tradition of secularism. However, as seen during the March 2019 [local elections](#), this move seems unable to stop falling support for the President Recep Tayyip Erdoğan-led religious-conservative Justice and Development Party (AKP), which lost several major [municipalities](#) in the March 2019 local elections, including Ankara, Istanbul and Izmir.

Turkey remains weak economically. It is suffering from fallout from the coronavirus pandemic, a broader balance of payments problem, inflation, and autocratic management of key monetary and economic institutions. In 2020, the Turkish lira dropped to historic lows in relation to international currencies. The Bank for International Settlements (BIS) [estimated](#) in November 2020 that Turkish lira depreciation during the first wave of the coronavirus pandemic (February-May 2020) was the deepest among 17 emerging market economies, and twice as high as during the great financial crisis of September to December 2008. In September 2020, citing a balance of payments crisis, Moody's downgraded Turkey's sovereign debt to '[B2](#)' with a negative outlook. The credit rating drop from 'B1' to 'B2' puts Turkey on a par with Egypt or Tunisia.

[Analysts](#) have warned that Turkey could experience an even worse balance of payments crisis than it did in 2018. The interest rate increase by the Turkish central bank to 10.25 % in September was still insufficient to stop rampant inflation of 11.75 %. The Turkish economy performed far below its potential, resulting in the [free fall of the Turkish lira](#), which lost 46 % against the euro in 2020 and 35 % against the US dollar, attaining a historic low against both currencies on 6 November 2020. On that day, Erdoğan fired Turkish central bank governor Murat Uysal, only 16 months after he took office, and [appointed](#) former Finance Minister Naci Agbal in his place. On 19 November, the Turkish central bank [decided](#) to increase 'decisively' the one-week key rate to 15 %. The central bank took this decision despite [political pressure from Erdoğan](#), who had stated, just the day before, that Turkey 'should not allow our investors to get crushed under high interest [rates]'.

## Increasing international isolation

Turkey's policy decisions, despite the desired objective to defend the country's 'pivotal role' in the region, have weakened it and isolated Erdoğan. The US government has criticised Turkey's unilateral acts, including the Turkey-Libya MoU and its behaviour in Cyprus. The US State Department Assistant Secretary of State for the Bureau of Energy Resources, [Francis Fannon](#), said that the US has 'been very consistent in calling [on Turkey] to stop all provocative actions that could undermine investment confidence in the East Mediterranean region and affect political stability'. Senator [Bob Menendez](#) (Democrat, New Jersey), a member of the Foreign Relations Committee and one of the architects of the [Eastern Mediterranean Security and Energy Partnership Act](#), called on 22 June 2020 for sanctions to be imposed on Turkey over its 'escalation in aggression in the eastern Mediterranean in a way that threatens US interests'.

The Eastern Mediterranean Security and Energy Partnership Act, introduced by the US Congress in April 2019 and [signed](#) by the US President on 20 December 2019, authorised new security assistance for Cyprus and Greece and lifted the US arms embargo on Cyprus. It also authorised the establishment of a US-Eastern Mediterranean energy centre to facilitate energy cooperation among the US, Israel, Greece and Cyprus. Furthermore, the US warned Ankara that it risked sanctions under the [Countering America's Adversaries Through Sanctions Act](#) if the [S-400](#) air defence missile system that Turkey bought from Russia was activated. The Trump administration [imposed](#) 25 % tariffs on Turkish steel in March 2018 (these were increased to 50 % in August 2018). Tariffs, imposed amid tensions over the since-freed American pastor [Andrew Brunson](#), who was detained in Turkey on charges of links to the Gülenist Terror Group (FETÖ) and the PKK terrorist group, remained in place until May 2019.

## Policy responses

In 2021, both the US and the EU are likely to continue their clear policy towards Turkey, which is influenced more by Turkey's current provocative behaviour and several political disagreements than by common economic interests. According to [experts](#), for the US, 'the policy begun under the Obama administration of building up Cyprus and Greece as strategic partners to replace Turkey is likely to continue'. The position of the EU is also tilted towards a more sceptical and prudent view. The European Commission [announced](#) in March 2020 that Turkey would not receive any pre-accession funds during the 2021-2027 period, in contrast to the €3.2 billion allocated to the country from the Instrument for Pre-accession Assistance in 2014-2020. Furthermore, the much needed modernisation of the [EU-Turkey customs union](#), which came into force in 1995, could be suspended despite the fact that the [European Council](#) of 1 October 2020 called for conditional modernisation as part of an effort to 're-energise the EU-Turkey agenda'.

In case of renewed Turkish unilateral and provocative actions in breach of international law, such as Erdoğan's [visit](#) to the northern Cyprus Varosha beach resort, and his support for a two-state solution in violation of UN Security Council resolutions, the EU, as recalled by the [European Council](#), 'will use all the instruments and the options at its disposal, including in accordance with [Article 29 TEU](#) and [Article 215 TFEU](#), in order to defend its interests and those of its Member States'. This view was echoed in the Commission's 2020 [annual report on Turkey](#). The European Parliament shares this opinion. It has called in the past for a conditional modernisation of the EU-Turkey Customs Union (see [resolution](#) of March 2019 on the 2018 Commission report on Turkey), but has also opened the door for new sanctions and suspension of the Customs Union ([resolution](#) of October 2019 on [Turkish military action in Syria](#) and [resolution](#) of November 2020 on escalating tensions in Varosha). A growing number of [voices](#) suggest that the EU could decide to apply new tariffs on selected goods, such as Turkish steel. At the 10-11 December 2020 European Council meeting, EU leaders asked High Representative/Vice-President of the Commission Josep Borrell to draw up a report on the state of EU-Turkey political, economic and trade relations and to suggest how to proceed, including on widening sanctions, and submit it to the leaders by the time they hold their meeting in March 2021.

## 10. A new US President in the White House



Having received 306 out of 538 Electoral College votes resulting from the US presidential election on 3 November 2020 – and some seven million more popular votes than his Republican rival, Donald Trump – the Democratic candidate, former Vice-President [Joseph \(Joe\) Biden](#) will shortly become the 46th President of the United States. As is customary, the new President will be sworn into office on 20 January (Inauguration Day), alongside Vice-President-elect, Senator [Kamala Harris](#), the first woman to occupy this office. The new administration is likely to infuse renewed momentum into transatlantic relations, but experts caution that not all areas will be ripe for EU-US cooperation.

Towards the end of last year, the Biden-Harris transition team nominated several members of the future [White House](#) staff, as well as [national security](#) and [economy](#) nominees and appointees. Notable among them are the nomination of Janet Yellen for Secretary of the Treasury, Anthony Blinken for Secretary of State, Linda Thomas Greenfield for US Ambassador to the United Nations and former Secretary of State John Kerry as special presidential envoy for the climate. [Alejandro Mayorkas](#), nominated for Secretary of Homeland Security, would be the first Latino to hold this position, if confirmed. Yellen would be the first woman to lead the Treasury Department. The earliest possible date for [confirmations](#) of presidential appointees by the Senate is Inauguration Day. The President-elect has appealed to the Senate to give the nominees a 'prompt hearing', but analysts suggest that a lot will depend on the final make-up of the Senate, which will only be determined with the results of two closely fought [run-off](#) elections held in the state of Georgia on 5 January. [So far](#), the Republicans hold 50 seats and the Democrats 48. The composition of the Senate and the relationship between the President and the Senate majority leader will significantly [affect](#) the degree to which the new President's agenda can be accomplished.

### Challenges for the Biden Administration

By all accounts, Joe Biden takes over the US Presidency at a challenging moment. The coronavirus pandemic has severely affected the United States, both in health and [economic](#) terms. As of the end of 2020, almost 350 000 US citizens had [died](#) of the Covid-19 virus and close to 21 million had been infected. In April 2020, US unemployment rates [peaked](#) at levels not seen since the Great Recession. High levels of political and social polarisation, including over racial and civil rights issues, have led to what many term a '[divided America](#)'. This has been exacerbated by the [disproportionate](#) way in which the pandemic has affected different income and ethnic groups, with lower income Americans hardest hit. Among other things, Biden also inherits his predecessor, Donald Trump's, controversial [immigration](#) agenda, poor [environmental record](#), and unconventional foreign policy that has led to the United States' withdrawal (or announced intention to withdraw) from a range of multilateral organisations that have been the hallmark of the liberal international order pioneered by the United States.

The [Biden plan](#)'s main components include:

- the 'made in all of America' future, which aims to use smart investments in manufacturing and technology to create manufacturing and innovation jobs across the US, including a US\$400 billion 'Buy American' fund;
- building on the Affordable Care Act by giving Americans more choice, reducing healthcare costs, and making the healthcare system less complex to navigate;
- tackling the climate emergency, including through a clean energy revolution, ensuring that the US achieves a 100 % clean energy economy and reaches net-zero emissions by 2050;
- improving racial economic equality, through a range of initiatives, including access to affordable housing for black, brown, and native families.



The Biden-Harris team has also outlined a detailed approach to beating the [Covid-19 pandemic](#) and an [economic recovery](#) plan, alongside plans in areas such as education, gun control, violence against women, immigration, LGBTQ+, employment insurance and a range of others.

## An opportunity for renewed transatlantic cooperation?

There is widespread expectation that, as president, Biden will [restore](#) diplomacy and liberal values to US foreign policy, following his plan to '[restore US leadership abroad](#)'. The new administration will seek to rebuild tarnished relationships with democratic allies to achieve greater unity towards adversaries. For the EU, the prospect of a new administration, as well as the President-elect's open support of the EU, has spurred hopes of a renewed transatlantic agenda. However, geopolitical and domestic pressures may still limit the space for cooperation on issues such as trade and digital regulation. Following a period of change and uncertainty in transatlantic relations, the Biden administration is likely to mark a departure from several of the [trends](#) observed in recent years, which have disrupted long-held assumptions in transatlantic relations. Most [analyses](#) concur that in areas such as multilateralism, the promotion of human rights and democracy, climate change, and the approach towards authoritarian regimes, notably Russia, the EU and the Biden administration will find fruitful common ground.

As a long-time [supporter](#) of NATO, Biden is certain to rebuild confidence in the US commitment to the alliance. At the same time, EU-NATO [cooperation](#) advances alongside (and as part of) EU efforts for strategic autonomy. The Secretary General of NATO has confirmed that the President elect has been [invited](#) to the NATO summit due to take place in Brussels in early 2021. This comes at a moment when the NATO 2030 group of wise persons report has [recommended](#) a more political role for NATO. Biden has also emphasised the need for the alliance to safeguard its democratic nature. On trade, the Biden administration is likely to take a slightly more constructive approach vis-à-vis the EU, compared to that of the Trump administration. A central hope would be a shift away from the [transactional](#) 'mini-deals' of the Trump administration and settlements on the tariff front. By contrast, the blockage of nominations to the [WTO Appellate Body](#) may continue under the Biden administration. There are also [hopes](#) that agreement will be reached with regard to the digital tax dispute between France and the US once Biden takes office.

In 2018, the European Parliament [recalled](#) the longstanding EU-US partnership and alliance, and insisted that it 'be based on jointly sharing and promoting together common values including freedom, rule of law, peace, democracy, equality, rules-based multilateralism (and) sustainable development'. It welcomed the work of the Transatlantic Legislators' Dialogue in [fostering](#) EU-US relations. EP President David Sassoli [congratulated](#) Joe Biden on his victory on 7 November 2020, emphasising the need for a relaunch of transatlantic relations. The Parliament has [urged](#) the US to re-join the Paris Agreement on climate change and called for the removal of US tariffs imposed since 2017.

## 2021: The beginning of a renewed transatlantic relationship?

The European Commission and High Representative's [communication](#) on 'A new EU-US agenda for global change', adopted on 2 December 2020, lists the fight against coronavirus, economic recovery, climate change, technology, trade, multilateralism and shared values, and the promotion of democracy, peace and security, as key areas. Concrete initiatives such as a new EU-US security and defence dialogue, an EU-US Trade and Technology Council, transatlantic dialogue on the responsibility of online platforms and big tech, an agreement on artificial intelligence (AI) and full participation of the EU in the President-elect's proposed summit for democracy, may create new momentum for closer cooperation between the EU and 'Biden's America'. On 10-11 December, the European Council [emphasized](#) the strategic importance of a renewed relationship with the US. The new US president's proposed visit to Brussels in early 2021 will be a first chance to assess the change in dynamics.

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This is the fifth edition of an annual EPRS publication aimed at identifying and framing some of the key issues and policy areas that are likely to feature prominently on the political agenda of the European Union over the coming year.

The topics analysed are: the Covid-19 race for a vaccine; the recovery plan; access to food; inequality; challenges for culture and the performing arts; a digital boost for the circular economy; critical raw materials; border controls; Turkey and the eastern Mediterranean; and the new US administration.

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