

# COVID-19 REPORT

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COUNTRY PROFILES & FORECASTS,  
EXPERT CONTRIBUTIONS



**STRAT&SEC**

UFG STRATEGY AND SECURITY  
SOCIETY

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# PART I

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## EUROPEAN COUNTRY PROFILES & FORECASTS BY UOFG STUDENTS

[ALL VIEWS AND SCENARIOS EXPRESSED IN THIS PAPER ARE BASED ON THE AUTHOR'S PERSONAL JUDGEMENTS AND INTERPRETATIONS]





# INTRODUCTION TO COVID-19 REPORT

ELLIE CAITLIN WILSON

Over a year has elapsed since the world's populations became acquainted with COVID-19. As of early April 2021, approximately 2.86 million people worldwide have been reported to have died with the disease. The death toll for those who have died, or will die in the future, as a result of lockdowns and economic difficulties is yet unknown. As vaccination schemes begin to take place at varying paces across Europe, new hope is offered, as well as new points of tension. The impacts of COVID-19 have been wide-ranging, and this report touches on some of these consequences in selected European cases. These major points of concern will be broadly outlined below, and will be expanded on in a country specific manner in the European case studies.

One of the most salient concerns is the loss of life. While the disease is relatively mild in most people, with some experiencing no symptoms whatsoever, it can prove fatal in those who are elderly or have underlying health conditions. Richer countries seem to be struggling particularly with loss of life resulting from COVID-19. This may in part due to the way deaths are recorded, however it has primarily been attributed to a high prevalence of elderly and obese/overweight individuals in the population. Aside from deaths due to COVID-19, concerns have also been raised regarding deaths as a result of COVID-19 mitigation measures. Mental illness, substance abuse, and increases in domestic violence as a result of lockdown remain pertinent issues that are often overlooked in policy circles. Missed treatments; such as cancer screenings, chemotherapy, or surgery, have also posed major concerns, as has delay or avoidance of medical care due to fear of the virus.

The economic impact of the pandemic and associated mitigation measures has also been profound. Global economic output has dropped significantly, and flows of migration have been severely restricted. This has affected the hospitality, entertainment, and tourism sectors particularly, as well as harming migrant workers. This has been felt particularly through increasing rates of unemployment and business closures. These will hit the poorest in society the most, and disproportionately affect the world's poor. This in itself, has the potential to cause great loss of life, due to the associated health implications of poverty.

The pandemic's political effects have been far-reaching. Changes in domestic political dynamics have been observed in a number of countries as a result of economic downturn and perceived government handling of the virus. Conversations about democracy have also arisen as the pandemic and its securitisation have led to wide-spread deprivation of civil liberties, and encouraged authoritarian tendencies. The impact of these shifts may be long-lasting. Moving away from the domestic political sphere, consequences for international politics have also been observed. Vaccine protectionism and concerns over funding have furthered tensions within the European Union. Meanwhile, the rise of China, one of the few countries who has seemingly benefited from the pandemic, also may herald changes to the international order.



# EXECUTIVE SUMMARY

CARIAD ROSS

## FRANCE

France saw a second wave in the pandemic in October, and there has been an increase in cases in Northern France and Paris in the last month. As a result of measures to combat the spread of the virus, France suffered economic hits; like most states, non-essential businesses were closed down which faced the biggest toll. France faces a significant increase in inequality amongst social demographics particularly those in the lesser advantageous communities who do not have access to computers. France has also seen a collapse of the entertainment industry.

There is growing dissatisfaction over COVID-19 measure and the general political handling of the crisis and reasons to suggest that the implications of the crisis are having a negative impact on the mental health of the French population.

## GREECE

Greece has suffered an increasing number of people being infected by the virus coupled with the significant decrease in international tourists which contributes significantly to the country's GDP. This has resulted in an increased deficit and unemployment compared with 2019.

Socially, Greece is finding that the population are not adhering to restrictions with large groups meeting outdoors (including the Prime Minister) and there also seem to be anti-vaccination sentiments. These are similar to the fear surrounding the side effects and production of the EU vaccines on which Greece is dependent. The socio-political climate in Greece is tense with anti-police and police brutality coupled with rising dissatisfaction in the government. However, COVID-19 seems to have had little effect on the Greek and European relationship and its relationship with China has remained strong throughout the pandemic.

## HUNGARY

Hungary has been relatively least affected in Europe by COVID-19 and nearly 500,000 have received both doses of a vaccine. The state also maintains WHO recommendations of masks and hygiene measures with state mandated fines for those who do not comply.

Hungary has taken efforts to lighten the economic impact yet Hungary has had one of the worst economic downfalls since 2010. With a prediction of 6% decline in GDP, there is a projected fast economic recovery as Hungary will be part of the European Union's recovery package to help speed up the recovery process by 2022.

The political impact COVID-19 has had on the current ruling party has decreased its popularity, although the state is in a "state of danger" emergency which has put a hold on elections for the time being. During this time, Hungary has made advances in their diplomatic relations with China as China has not only provided essential vaccines and PPE but also gained economic benefits with major Chinese investments.





## ITALY

In 2020, over 2 million people tested positive for COVID-19 with a mortality rate of 10.2%, affecting predominantly older men. Italy was one of the first European states to take executive action which restricted movements within and between borders. Italy has been using the top 3 vaccines; Pfizer-BioNTech, Moderna and Oxford-Astra Zeneca, however, the distribution of the latter has been halted pending further investigation into the link between the vaccine and blood clots. By March 18th, 2021 over 2 million people have been vaccinated with both doses.

Italy has had an increasing decline in the economy throughout the pandemic, seeing a brief boost in the summer when containment measures were lifted. Italy is also seeing an increase in unemployment, hitting all industries. After much debate, Italy has been able to receive a loan from the EU Recovery Fund.

The state has also suffered socio-political ramifications as a causal link to COVID-19. The societal implications have seen a greater disparity in equality of the already disadvantaged and those living below the poverty line. The long term and psychological effects of the virus must be taken into consideration, not only on those who have been infected but also those who have had to watch their loved ones suffer. Political tensions are rising in Italy over immigration together with tension around Russia's assistance as well as financial stagnation. Due to COVID-19, Italy's contributions to NATO have decreased which has led to a gap in global NATO operations. During the pandemic, Italy has also become vulnerable to cyberattacks.

## NETHERLANDS

By March 2021, the Netherlands have had over a million cases of COVID-19 and 600,000 people had received 2 doses of the vaccine. However, there is still a rise in new cases leading to an extension of the general restrictions as well as restrictions on travel abroad but there has been a relaxation in the curfew.

GDP has fallen to the same level as the 2009 crisis, as seen in the decline in revenue from exports and imports. The Netherlands have also experienced a rise in unemployment and recovery depends on the outcome of the pandemic. The political impact COVID-19 has had on the Netherlands resulted in the government resigning at the beginning of 2021 and anti-pandemic restriction riots have ensued in some places.

## UNITED KINGDOM

The United Kingdom has been economically and socio-politically impacted with a strong vaccine rollout strategy but with heavy financial borrowing. The vaccination programme has been at the forefront amongst its European neighbours yet there is anger over the hoarding of vaccines from the poorer nations. Whilst the pandemic has been on-going, the UK has been making advances on the international stage with the upcoming COP-26 Summit in Glasgow. The UK makes plays internationally as the UK takes steps against the human rights abuses in China and the 5G technology.

The economic fallout from COVID-19 has resulted in a decrease in GDP for the United Kingdom with hospitality suffering the biggest loss, yet an economic increase in social and health care. England is seeing an increase in economic disparities as a result of COVID-19, Northern Ireland has faced economic impacts, but Brexit has been a contributing factor to its economic downfall. However, there is projected growth for the Northern Irish economy for the upcoming year. The Welsh employment rate has decreased in 2020 and Scotland has predicted economic growth in 2021 to pre COVID-19 level as restrictions lessen. Along with economic turmoil, the pandemic has had far reaching socio-political effects.

The socio-political impact has differed somewhat between 4 nations. England has used the vaccine rollout as a way to bolster public opinion after dissatisfaction over Johnson's government handling of the pandemic. There have been increasing calls for independence from Westminster. The governing body of Wales has not experienced a decrease in public opinion to the same extent as England however, there has been growing support for independence. There have been similar reactions in Scotland; overall approval of Holyrood coupled with a rise in calls for independence from Westminster. In Northern Ireland independence has grown increasingly popular in the under 40s demographic.

# UK COUNTRY PROFILE AND FORECAST.

ELIA DURAN-SMITH, LARA KUSCHLANSKI, JOHN-ROSS LLEWELLYN

## INTRODUCTION

It has now been over a year since the UK closed down for the first lockdown of the COVID-19 pandemic. Currently the country is coming out of its third and so far, longest shutdown as of yet. In the following section of the report the economic and socio-political impact of the pandemic on England will be analyzed. Further an outlook as well as the best- and worst-case scenario will be elaborated on in light of the recent rollout of vaccinations. The United Kingdom finds itself as one of the world leaders in regards to the successful vaccine rollout and high uptake of a national COVID-19 vaccination programme. On its own, this provides the UK with a more positive economic outlook. This report outlines the numerous impacts COVID-19 has had not only on the UK as a whole, but also the nations which make up this United Kingdom, ranging from economic, socio-political, geopolitical, all of which will invariably affect the overall future of the UK. The whole UK finds itself with a COVID-19 bill of around £400 billion, following the recent 2021 budget set out by the Chancellor and in a situation where government borrowing continues to increase as of January where monthly borrowing stands at £8.8 billion. The UK's borrowing from 2020-21 stands at £271 billion, a record high throughout its history.

## ECONOMIC IMPACT

### UK

The overall gross domestic product (GDP) of the country has declined by 9.9% in 2020. The monthly GDP in January of 2021 has fallen by 2.9% compared to that in February 2020. These figures are attributed to the shutdown throughout the economy of the UK and its constituent nations.

Monthly production, manufacturing and construction have all dropped by at least 1.5% compared to the numbers in February of 2020. The biggest losses can be observed in the service sector, in retail and wholesale as well as in education. Hospitality has seen a major fall with 29.3% loss over the last year. One of the few sectors that has seen an increase since the second quarter has been the human health and social work sectors. This can be attributed to the significant increase in testing and tracing in 2020.

As of the first of February, the UK has officially left the European Parliament. This contributed substantially to the economic shock of the country. While COVID-19 has had the most impact on mainly non-tradable services, Brexit affects most sectors of the industry that rely on cross border trade with the EU. The long-term economic impacts of both COVID-19 and Brexit have and will compound together to have a cumulative effect on the UK economy. COVID-19 will mostly impact the UK's short term economic prospects whereas Brexit will be most influential in impacting the long-term economic prospects of the UK economy. The short-term economic effects that COVID-19 has had on the UK economy have received more attention than the short-term economic impacts of Brexit on the UK economy.

### England

Regions in the north and south of England have seen their economic inequalities exasperated due to the pandemic which has negatively impacted income and employment within these regions with vastly different economic structures. This has made pre-pandemic government plans to 'level up' poorer regions within England significantly harder. A slow recovery in the manufacturing sector, which largely makes up the economies of the poorer, northern regions serves to illustrate this point. Likewise, cities in England have a stronger chance of economic recovery from COVID-19 than rural areas. COVID-19 will likely result in the reorganisation of economic activities throughout England as well as the UK and has revealed how exactly this can be done in a more equitable way.

### Northern Ireland

This section looks at the economic impacts that Northern Ireland (NI) faces. Following the severe economic contraction after introducing lockdowns to curtail COVID-19 (NI's economy diminished by 1.4% in the 3rd and 4th quarters of 2020), the economy of NI is projected to grow by 5.5% throughout 2021 following an approximate 11% fall in 2020. It is no surprise that the service sector was hit the hardest with its output having shrunk by 2.5% quarter on quarter. Manufacturing has faced a smaller reduction in output. Construction and public services, on the other hand, grew in 2020. The Danske Bank has predicted that Northern Ireland's economy will have contracted in the first quarter of 2021 but may see some significant growth by the end of the year. The Danske Bank's chief economist, Conor Lambe, estimates that the Northern Irish economy will grow by 4.8% in 2021 and 5.8% in 2022.

COVID-19 has also added onto the uncertainty and problems surrounding Northern Ireland's economy in its post-Brexit situation. Businesses based in Northern Ireland have faced difficulties in trading in both Great Britain and the Republic of Ireland as a result of the hard Brexit secured in December 2020 which established the "Northern Ireland Protocol".





This protocol means that Northern Ireland remains within the single market and customs union of the EU, thus regulations on manufactured and agricultural goods in Northern Ireland may differ from those in the rest of the UK. Despite the government extending the introduction for full border control processes until 1 January 2022, businesses have still suffered because of the trade restrictions during the pandemic. This has been further exacerbated by the British government's failure to deliver its promise of a cash-back scheme for companies affected by EU tariffs in Northern Ireland, which was supposed to come into force once the Brexit deal had been agreed.

#### Wales

This section addresses the economic situation in Wales. The employment rate in Wales throughout 2020 among 16-64 year olds was 3% lower than the UK. Wales' unemployment rate was slightly lower than the UK's from October to December 2020 compared to this rate being significantly lower than the UK's earlier on in the year. Again, throughout the first months of 2021, employment and unemployment rates in Wales stand below the UK rates. There has been a serious drop in the GDP of Wales due to the COVID-19 pandemic as exemplified in the 15% drop which occurred during the months of April and June in 2020.

Even during the most positive period for the Welsh economy in 2020, between July and September, economic growth was at -6% compared to 2019. Between the 2nd and 3rd quarters the GDP of Wales increased by 14.4%. The accommodation and food service sector saw the vast majority of this increase as the sector experienced a growth of 302.5%. The lockdowns since then have naturally had a significant effect on the Welsh economy and the Welsh government pledged in February to invest an extra £270m in long-term support to businesses across the nation.

#### Scotland

The economic impact that COVID-19 has had on Scotland will be looked at because of the role it has played throughout the UK's COVID-19 response.

The hospitality and theatre industries have been the hardest hit sectors throughout the COVID-19 pandemic and subsequently will be the last sectors to fully recover. GDP across Scotland is predicted to grow by just under 2% throughout 2021 as restrictions continue to be put in place even with the current rollout of the vaccine programme. Once restrictions are no longer required, stronger growth rates of at least 7% are possible throughout Scotland, which is most likely to be seen in 2022 or whenever the rate and success of the vaccination programme allows for the disbandment of the restrictions.

Scottish businesses are set to face a significant recovery once COVID-19 restrictions are fully eased. However, the conclusion of Brexit and its impacts on the wider economy through trade disruption and delays in the movement of goods is set to come into clearer focus as businesses move on from COVID-19. Likewise, GDP growth in Scotland during the 3rd quarter of 2021 is projected to stand at -1.6% compared to +0.2% in the UK.

Even if some form of growth and recovery is very likely, large numbers of businesses feel foundationally pessimistic about Scotland's forecast for 2021 with around 70% of businesses expecting economic growth to be weak or very weak in 2021 and around 98% of businesses asserting that economic uncertainty will be an important or very important issue affecting them in the 1st quarter for 2021.

The economic impacts of easing lockdown and COVID-19 coming to an end vary from being temporary and easily reversible to long-term and permanent. The vast and permanent negative effects which are likely to come from a COVID-19 induced recession are that young Scots are most likely to face unemployment and be in this situation for the long-term during times of economic crises, especially given that the economic crisis caused by COVID-19 is severe.

Finally, it will be in 2024 before Scotland's GDP recovers to its pre-COVID-19 level.

### SOCIO-POLITICAL IMPACT

#### UK

The policies that have been rolled out in response to the pandemic have been put in place to counteract the rising case numbers as best as possible. However, the lockdown has had a negative impact on public trust in the government, especially within disadvantaged communities. The regulations have had both a mental and financial strain on many, aggravating many pre existing issues and creating new ones.

#### England

In specific regard to England, the vaccine rollout has helped Boris Johnson's government to recover the public support it lost throughout 2020 when the pandemic was the main feature of life in the UK. Throughout 2020, the leader of the opposition, Keir Starmer, enjoyed a higher personal approval rating due to the response of Boris Johnson and his government in handling the COVID-19 pandemic and the slow pace at which they implemented measures to contain the spread of the virus. Likewise, the mass rollout of vaccines and the ongoing success of containing the COVID-19 virus has changed the socio-political situation in England. Throughout 2020, Boris Johnson's Conservative party had either surpassed its Labour opposition by small margins, tied with them or trailed them in the opinion polls. Now with the vaccine rollout gathering pace, the Conservatives on average enjoy healthy leads of 7-10% in public opinion polling of which is most relevant and apparent throughout England. The increase of English Conservative councils after the local elections of 6th May seem to validate these pollings.

#### Wales

Wales' socio-political situation is that it leads among other UK nations regarding its percentage of the population who have received a 2nd vaccine which stands at 14.3%. The COVID-19 crisis has elevated the profile of the First Minister Mark Drakeford, who is now more recognisable in Wales than the UK figurehead of his party, the Labour leader Sir Keir Starmer. Yougov polling had suggested that around 57% of Welsh voters think Mark Drakeford is doing well.





Despite theoretically there being a serious increase of support for Welsh independence (with polls reaching levels of 40% support), the politics of Wales has not changed dramatically after Wales' parliamentary elections in May. The governing Labour party will continue its predominance, having won half of the seats in the Welsh Parliament.

#### Northern Ireland

The socio-political impact that COVID-19 has had on Northern Ireland will be looked at in this section. There has been growth in support for a referendum on the reunification of Ireland because of demographic changes and the British government's handling of Brexit. The 2021 Census has been projected to demonstrate that a slim majority of people in Northern Ireland are of Catholic heritage. Furthermore, people under 45 have generally been shown to be narrowly in favour of Irish reunification (47% compared to 46% for remaining in the UK). The effects of COVID-19 and Brexit on food supplies and the ability of Northern Irish businesses to trade as normal has attracted dissatisfaction from unionist parties. The DUP and UUP both opposed the protocol; the Loyalist Communities Council has stated that unless the protocol is amended to provide unrestricted trade between Northern Ireland and Great Britain, the Good Friday Agreement may be permanently countermanded. An initiative called the 'Shared Island Unit' led by the Irish government aims to provide a platform for cooperation on cross-border affairs.

The political and economic impact of the Northern Ireland Protocol (which established an economic border between Northern Ireland and the rest of the UK), compounded by the COVID-19 crisis, has fuelled tensions within the Democratic Unionist Party, leading to the resignation of the First Minister Arlene Foster. The time taken up by leadership elections within the DUP and the choice of leader may have some impact on the rate and methods Stormont will take to lead Northern Ireland toward a recovery from this crisis.

#### Scotland

As the lockdown eases over time and people are given greater opportunities to socialise with one another, overall mental health will start to see improvements, since this has been a consequence of the numerous lockdowns Scotland has undergone to tackle the COVID-19 pandemic.

Despite widespread public approval of how the Scottish government is handling the COVID-19 pandemic among the Scottish public, support for Scottish independence stands at 47% to 48% wanting to stay in the UK as of late April 2021 according to a Panelbase survey. This is a serious shift away from the trend of a continual rise in support for Scottish independence since December 2019 and January 2020 where it reached heights of 55%, which can be arguably explained by the way the Scottish government has managed the COVID-19 pandemic throughout 2020 in contrast to the UK government.

In the May 6th 2021 elections, the SNP increased its previous results, but didn't win an absolute majority by one seat, although a pro-independence majority through the SNP and the Greens collectively exists. Nevertheless, Sturgeon's plan for reclaiming a new referendum is set after the pandemic priority ends. As such, there is a decreasing chance that COVID-19 will create a political climate conducive to a 2nd independence referendum.

#### IMPACT ON MULTILATERALISM

The UK's vaccination campaign has made it both a global and European leader in regards to the number of COVID-19 vaccines that have been given. However, several other countries in Europe are ahead of the UK when it comes to the percentage of the population who are fully vaccinated against COVID-19 and have received 2 vaccines. Multilateralism is seriously challenged as the UK is facing scrutiny for not sufficiently sharing its vaccine doses with its EU members and the world's poorest countries who face alarming shortages.

The COP-26 Summit in Glasgow in November 2021 is recognised as the UK's opportunity to establish itself as a key player in advancing multilateral goals, particularly on global warming. The low levels of emissions caused by the UK's national lockdown and lockdowns across the globe illustrates the need and urgency of rebuilding the global economy on green foundations following the COVID-19 pandemic.

The geopolitical and economic centre of gravity during the 2020s will very likely be in the Indo-Pacific region. The UK has taken actions to make the most of this emerging reality by using its soft power in the region for diplomacy and development as well as conducting trade agreements with the Association of Southeast Asian Nations (ASEAN). The UK is being urged to pay particularly close attention to developing its economic, security and political ties with Indonesia.

#### INFLUENCE OF CHINA

The Integrated Review of Security, Defence, Development and Foreign Policy states that the UK plans to coordinate future plans on transnational security challenges such as health crises and climate change. However, the UK will also endeavour to gather intelligence on China and its people to be able to develop a comprehensive security strategy to combat China's increasing assertiveness, particularly within the Indo-Pacific region. This strategy will include strengthening the Critical National Infrastructure and the resilience of critical supply chains.

UK-China relations look as though they will be characterised by serious tension and increasing ties, considering how, in the words of Prime Minister Boris Johnson, the UK will have to 'strike a balance' in how the UK cooperates with China. The serious tension will emerge due to the UK's strong disapproval for China's treatment and mass detention of the Uighur people in the Xinjiang and the increasing ties aspect will be due to the greater and basic need for the UK to work on issues of cyber and other forms of security with China.

The UK and China have engaged in tit-for-tat sanctions on one another's national officials with 4 Chinese officials being sanctioned by the UK over violating the human rights of Uighur Muslims in Xinjiang and likewise, China has responded by banning numerous UK MPs from entering China. The UK has taken a more hardline stance in contrast to its European neighbours on the application of Chinese made 5G technologies in which the UK has promised to remove this kit by 2027.



All of these measures can be explained by China's crackdown on democracy and human rights in Hong Kong and Xinjiang respectively. There will be a need for cooperation between both countries on the issue of global warming, considering how both countries are significant greenhouse gas emitters powerful knock on effect which solidifies the odds of Welsh independence becoming a reality. The souring of UK-China relations is reflective of the broader debate on the conflicting models of governance between democracy and authoritarianism. COVID-19 is relevant within this broader debate as it has highlighted the contrasts between democratic and authoritarian nations during the pandemic. China's authoritarian regime allows it to maintain broad public support and compliance for its lockdown measures whereas democratic countries like the UK are more likely to see its citizens openly express their disapproval and not comply with their lockdown measures.

Given that the COVID-19 pandemic has its origins in China, anti-China sentiment among the UK population has risen and increasing attention among government policymakers will subsequently be focused on anti-Asian racism within the United Kingdom. As such, UK-China relations are predicted to worsen as time goes on with COVID-19 contextualising and solidifying these developments to some extent.

#### MOST LIKELY SCENARIO

With the steady rollout of vaccinations in England and the UK, with a total of 47,540,984 people having received at least one dose of the vaccine by the 28th of April 2021, with over 60% of the UK population having received their first dose. Starting the 5th of March 2021, 267 hospital hubs, 1,034 local vaccination sites, 224 community pharmacies and 124 vaccine centers have been able to provide the vaccine. This gives hope that the plan to ease restrictions will be able to be upheld, with shops, restaurants and pubs, libraries and community centers having reopened in April and finally all limits on social contact to be lifted in June. As of now, all easing measures have been rolled out, being implemented as planned throughout each constituent part of the UK. The reopening of societies for England, Wales and Northern Ireland happens on schedule, given the increasingly successful vaccine rollout in these countries, with no delays as of now.

Scotland is still on track to meet its vaccination targets despite an expected shortfall of 500,000 vaccines it will face throughout April. As such, it is very likely to be a greater focus on prioritising second doses for already vaccinated Scots, especially over-50s. This means that measures to reopen Scotland's economy and society will experience a fair delay. However, if shortfalls like these continue to happen throughout the year for whatever reason, then improvements in Scotland's economy and society will continue to worsen on the account that they will continue to linger on.

In regards to the increasing level of nationalist sentiments throughout Scotland, Northern Ireland and Wales, it is still unlikely that there will be any referendums to give these countries the choice of independence, or in the case of Northern Ireland reunification with Ireland. The handling of COVID-19 by Wales is less likely to prompt its population to desire independence in greater numbers than would be the case with Scotland. COVID-19 is unlikely to be an important calculus in hardening nationalist attitudes in Northern Ireland.

There continues to be a seriously unlikely chance of a 2nd independence referendum taking place in Scotland, considering the lack of an overall SNP majority in Holyrood. Scotland faces a greater chance of returning to greater, or perhaps full, normality now that its vaccination campaign is making significant strides. This very positive prediction is based on the fact that over half of the Scottish population have received their 1st jabs and close to a quarter of Scots are fully vaccinated as of late April 2021. Scotland, as well as the UK, may not be victim to a third wave of coronavirus cases given a robust vaccination campaign which increasingly serves as an ever-growing backstop on the pandemic, or if Scotland does face this 3rd wave, it will be significantly smaller compared to the previous 2 waves.

#### WORST CASE SCENARIO

There are many issues that could arise during the reopening process. Four factors were determined as being crucial for a sustainable easing of regulations. These are (1) that the vaccination program continues as planned. (2) The vaccines sufficiently reduce the amount of people dying or being hospitalized due to COVID-19. (3) The infection rates are low enough in order to avoid risking a surge in hospital admissions. And (4) the new corona variants do not fundamentally change the risk of eased restrictions. However, if any of these four factors do not occur, a fourth lockdown would have to be put in place, with numbers of cases rising again. As of now, eight countries have suspended the use of the Oxford-AstraZeneca coronavirus vaccine due to concerns over possible blood clotting. Despite the World Health Organization (WHO) and the European Medicine Agency (EMA) not having found any link between the vaccine and the reported side effect, this could cause potential issues for the vaccine rollout plan in England and the UK. Further, it is still unclear whether the new COVID-19 strains that have emerged over the last year are perhaps more resistant and how well they can be treated with the existing vaccines.

Scotland finds itself in a wave which continues to severely cripple its economy and harm the mental health of its citizens. More young people would face long term and chronic unemployment which locks them out of the labour market due to the reduced opportunities for developing workplace skills during full lockdown.

The worst-case scenario for the socio-political impact that COVID-19 can bring to the UK will be the increased nationalist sentiments across the UK, with rising support for independence in both Scotland and Wales and greater calls for reunification with Ireland in Northern Ireland. These sentiments could lead to greater calls for independence referendums to be held in these countries and the Westminster government giving in to these calls. The COVID-19 response of Scotland, Wales and Northern Ireland may lead their populations to vote for independence or reunification with Ireland in the case of Northern Ireland. Elections in the Scottish and Welsh parliaments and the extent to which nationalist parties in these countries enjoy positive electoral fortunes will determine whether the UK may or may not disintegrate. In this scenario, Scotland votes in favour of independence and this has a powerful knock on effect which solidifies the odds of Welsh independence becoming a reality.



# NETHERLANDS COUNTRY PROFILE AND FORECAST.

PELAYO FERNÁNDEZ GARCÍA

## INTRODUCTION

Since the start of the pandemic in early 2020 to the 1st of May 2021, there have been 1,496,352 cases of COVID-19 in the Netherlands, with 1,247,879 recoveries and 17,148 deaths. The vaccination process continues, with nearly 4 million people having received at least one dose of vaccine, with more than 1 million people having obtained their second dose.

On 28 April, the evening curfew moved to 4:30. Outdoor seating areas at restaurants and cafés may be open from 12:00 to 18:00, with some specific restrictions. All shops may admit customers without an appointment (but with limited capacity), shops selling non-essential goods can be open between 6:00 and 20:00, and supermarkets and other shops selling essential goods may operate on their usual opening hours. These measures, among others, will not change until at least 11 May. On 3 May the government will decide whether to allow more indoor and outdoor activities.

## ECONOMIC IMPACT

In 2020, the Netherlands' GDP fell 3.7%, on par with the 2009 crisis, the two steepest declines ever tracked by the country's statistics. Consumption fell 6.6% compared to the previous year, focusing (evidently due to confinement measures) more on food, and home accessories, compared to previous expenditures on hotels, transport, culture or clothing.

Dutch exports fell by 4.3% and foreign imports by 4.5%, but in absolute terms the former fell more pronounced, so that the trade balance ended with a negative 0.3% economic growth. A decline in employment of around 108,000 people is estimated at the end of 2020. Future expectations and confidence in the recovery would depend on the evolution of the pandemic and the imposition of more or less restrictive measures.

## SOCIO-POLITICAL IMPACT

The resignation of the government at the beginning of 2021 led to elections clearly marked by the development of the pandemic policies; in fact, the elections themselves were extended over three days of voting to avoid crowds. The previous prime minister, Mark Rutte, leader of the liberal VVD party is once again in the lead, but not with enough support to govern alone, being forced to form a coalition with at least four other parties, which ones will determine whether his policies turn more to the right or left.

All the open riots on the streets against curfews appear to have subsided, and a lower hourly restriction regarding this (although the restrictions themselves continue to be in place) could prevent further violence. However, these types of violent movements are part of a bigger problem, an anti-system phenomenon with different facets (extreme right, COVID-19 deniers, anti-vax, etc.) that has found a perfect breeding ground in the pandemic to express itself in the streets.

## IMPACT ON MULTILATERALISM

For years, there has been an anti-European trend in the Netherlands, that is only increased by the European cooperation policies during the COVID-19 crisis. The VVD, the last party to lead the Dutch government, and presumably to continue to do so, have kept this trend in check until now, but it is possible that the new governing coalition will bring about changes in this regard.

Fiscal coordination and economic contribution to the budgets of the European Union, mainly aimed at trying to alleviate the COVID-19 crisis in southern countries, exacerbated in a certain sense the popular feeling that they are contributing economically more than the Netherlands may be benefiting.

The government's position in this regard will depend on the internal pressures of the coalition, as has already been said, or on the benefits that can be obtained from the EU, such as the stimulus package of 500 million that the Dutch government seeks to use to cover its health and unemployment policies.

## INFLUENCE OF CHINA

Before the pandemic China was, after Germany, the second main importer of the Netherlands. Nevertheless, 2/3 of these products were once again re-exported, with only the rest destined for the manufacturing industry or own consumption. Naturally, China imports plummeted during the start of the pandemic.

With regard to the COVID-19 crisis, China has tried to present itself as a strong global leader. However, reliance on both the Netherlands and Europe for virus protection material has reformulated industrial strategy and safety policies in Europe. Also, the aggressive Chinese propaganda regarding the pandemic has sparked debates around the country's relations with China, especially regarding privacy and autonomy issues.

Moreover, Dutch intelligence services have pointed to the imminent danger posed by Chinese cyber-espionage in their economy, especially in banking, energy and infrastructure sectors. All of this reduces China's chances of achieving greater influence within the Netherlands.



#### MOST LIKELY SCENARIO

According to the official forecasts of Dutch government at the end of 2020, assuming that the COVID-19 is controlled both in the Netherlands and in the rest of Europe during the first half of the year, a growth of 3% in the Dutch economy is expected, after a 4% contraction in the previous year.

This would bring an extra 6% of unemployment, especially centered among the youngest, the self-employed and those with more flexible contracts. Salaries will decline, and with them purchasing power. Due to this, and despite the growth prospects, the government plans to continue with its policies to support the economy. However, the economic recovery is expected to make it possible to cancel this aid in the middle of the year, reducing the national deficit and debt.

The debt forecast to be achieved in 2021 is 4.6 of the GDP, 1.5% less than in the previous year. In the medium-long term, the economy is expected to gradually recover from the recession due to COVID-19. After the pandemic, 4% less GDP is calculated for 2025 than in March forecasts, which still did not take into account the impact of the virus. Between 2022 and 2025, an annual growth of the GDP of 1.5% is expected, although without any increase in purchasing power. Unemployment is expected to gradually decrease by 4.5% until 2025. With regard to public debt, and provided current policies are followed, it is believed that a 1.2% reduction in GDP can be achieved by that same year.

#### WORST CASE SCENARIO

The government of the Netherlands has also made its own predictions regarding a possible worsening of the pandemic. In this scenario, with new COVID-19 waves and without enough effective vaccines available, a contraction of almost 1% of the gross domestic product is expected in 2021, together with an unemployment rate that will increase more than 8% at the end of the same year.

Should this type of political-health drift lead to exacerbate the tendencies of the new governing coalition towards more pronounced anti-Europeanism, it would ultimately favor the more extreme right-wing tendencies. Ultimately, the rejection of solidarity within the European Union and the growth of Euroscepticism could lead to populist political movements demanding the split of the Netherlands from the EU, with unforeseeable but clearly serious consequences for both the country itself and the EU.



# FRANCE COUNTRY PROFILE AND FORECAST.

MELISSA ALIQUAT

## INTRODUCTION

1. As we have now passed the symbolic one-year anniversary, the COVID-19 situation in France remains precarious. When the second wave of COVID-19 cases started to increase in October 2020 in Europe, France took strict steps by declaring national lockdown on October 28th. It was the consequence of record daily reports of new cases, peaking at more than 30,000 mid-October. The similarities of this second lockdown compared to the first included non-essential businesses such as pubs and restaurants to close, but this time schools and factories remained open. A third lockdown was declared on April 3rd, which would last one month. The restrictions were quite different from the previous periods of lockdown: curfew at 7pm, suspension of attendance at school and banned domestic travel. On April 19th, President Macron announced a plan for the easing of restrictions, starting on May 19th and gradually opening up until June 30th with the end of the curfew.
2. This present report will dive into the impacts the pandemic had on the economy since summer 2020, but will also open a discussion on the general social stability and mental health of the French people. Moreover, we will analyse the vaccine policy put in place by the French government and its effectiveness within the European Union. As a conclusion and building on from the last report, a most likely scenario and a worst-case scenario will be provided.

## ECONOMIC IMPACT

1. As already experienced with the first lockdown, non-essential businesses took the biggest economic hit. Despite the promised subsidies and solidarity funds, many small businesses were unable to save their activities and the imposed curfew at 6pm prevented the population from going shopping and buying, which worsened the situation. There is however hope that the easing of restrictions will boost a better summer season.
2. According to the chief economist in the OECD, inequalities between the socio-professional categories have increased. One prime example is the inequality to the access to computers and workable internet connection, which impact both workers and students. Pupils and students in less privileged households were at a clear disadvantage and schools were left open to try and mitigate this.
3. Since summer 2020, the culture and entertainment industry has not been able to reopen nationally. It is now considered almost dead by its main actors and representatives. Half of the industry's employees benefit from short-term unemployment compensations.
4. In 2020, there was a historic decrease in GDP of 6.8% for the Eurozone. However, talks about the Recovery Fund at the European level have been overshadowed by the management of the vaccine policy.
5. Despite these economic hardships, economic solidarity is on the rise. This can be seen in the increase of donations to charities or to public health infrastructures such as hospitals due to more money saved in 2020.

## SOCIO-POLITICAL IMPACT

6. A change in behaviour can be noted between the first lockdown and the rest of the COVID-19 restrictions measures taken from October onwards. Indeed, the French people have become increasingly dissatisfied with the management of the crisis, yet they increasingly do not respect physical shielding, and social distancing measures are less seriously practiced.
7. Mental health considerations have only been mentioned in official government policy at the start of 2021. According to The Economist, for the first time since the end of the Second World War, the trend is that the younger population is less happy than the retired groups. This prospect is unlikely to change even after COVID-related restrictions are lifted because of the consequences of the current economic crisis and the expected debt burden.
8. Several indicators show that the mental health of the population has been on a steady decline since the start of the restrictions. An increase in the numbers of psychiatrist consultations and in the feeling of helplessness have been observed. A survey has also shown that one in three students have experienced suicidal thoughts.
9. Illegal gatherings of people have occurred, especially around the carnival season. Condemned by the public authorities, they have gathered more than 6,000 people in Marseilles in March and in addition to being a source of clusters, it is a proof of a feeling of slackening among the population.
10. Alongside this, some political actors are instrumentalising the situation in order to criticise the government's response and by extension Emmanuel Macron. Indeed, the presidential elections are a year away and official candidates can see this as an opportunity to put forward their own agenda.
11. At first hesitant about vaccination, the adult French population is now rushing to vaccination centres with the prospects of potential holidays and travelling in mind for the upcoming summer. This is facilitated by the fact that most of the elder and vulnerable groups have been vaccinated en masse. Nevertheless, as of May 1st, only less than 10% of the population is fully vaccinated.



The vaccine policy and its distribution to the population has been a test for inter-state cooperation. While most countries started their vaccine campaigns at the end of 2020, the first injections happened on the 27th of December for France. It became an opportunity to see whether tensions would arise, or cooperation would prevail. France vaccine policy started relatively more slowly compared to other European countries: priority was given to the age and profession groups at risk. The fact that two injections are needed for the vaccine slowed the process down even further. Nevertheless, the government, within the jurisdiction of the European Union, has managed to secure deals with pharmaceutical companies such as AstraZeneca and Pfizer to deliver millions of vaccines.

It can be noted that collaboration with the United States has been uncharacteristically delayed. President Biden's policy is one of using their own companies to vaccinate their own people. Contrary to this, Russia and China are rushing to provide vaccines to the rest of the world as a political influence tool. France has not engaged into unilateral talks and keeps on collaborating with its European partners. The French government works in conjunction with the European members and orders vaccines validated by the European Medicine Agency. France has taken on a more active role in the production process by implanting a firm responsible for manufacturing Pfizer vaccine doses for the first time on French territory on April 7th. The vaccines produced will nevertheless fall under the responsibility of the European Union to share, and not the French government.

### MOST LIKELY SCENARIO

As the race for vaccines will likely accelerate, cooperation is key. Contrary to expectations, the European countries have managed to work together, and the EU leadership has managed to secure millions of vaccines for the population. The only uncertainty lies with the private pharmaceutical companies responsible for honouring their contract in time. Despite promises, AstraZeneca is already lagging behind in terms of delivering in time and confidence in the vaccine has dramatically decreased following several cases of blood clot deaths. It is unlikely the majority of the population will be vaccinated by summer 2021 and as the election race will intensify, this may become a drawback for Macron's re-election. France will not be fully 'back to normal' by September and will likely keep imposing some physical and social distancing measures into 2022.

### WORST CASE SCENARIO

Macron's bet of not initiating a third lockdown soon enough backfires and plunges France into an even stricter lockdown, comparable to the first one. It adds years for the economy to recover from it and trust in the government is ruined. Far-right party leaders benefit from it and the state of democracy in France is at risk, more than it already is. France is forced to resort to a more selfish foreign policy in order to secure vaccines and breaks down the culture of cooperation among most European members. Pharmaceutical companies cannot keep up and the chain of supply is broken. The COVID-19 pandemic is not eliminated and is now classified as a seasonal infectious disease and we enter a cycle of pandemics.

Moreover, the social unrest and generational angst peak and the 2020s mark the advent of a 'lost generation'. Inequalities between the rich and the poor are as deep as ever, and the tertiary sector and all small non-essential businesses are killed in France.



# ITALY COUNTRY PROFILE AND FORECAST.

NADIRA MUKHAMEJAN & PELAYO FERNÁNDEZ GARCÍA.

## INTRODUCTION

Between February 2020 and 1 May 2021 there were 4,022,653 COVID-19 positive cases in Italy, with 436,170 active cases, 3,465,676 recovered and 120,807 casualties. During 2020, the increase in national mortality was 10.2%, following the general characteristics of the disease (affecting older people to a greater extent, and men more than women). A constant difference is also observed in the distribution of infections by regions, where those from the north were in the lead.

The Italian government was the first European country to take control measures against the virus, with a series of decrees that restricted the mobility of the entire country between February and May, when these measures began to be lowered. The restrictions were resumed again after the summer with the increase in cases, exercising different restrictive policies depending on the cases in each province.

The epidemic spread scenario advanced in three phases: a first wave between February and May 2020 (characterized by a quick diffusion of cases and deaths, and a strong territorial concentration in the northern regions), a phase of summer transition between June and September (with an apparent containment of cases, until the appearance of new outbreaks in mid-August), and a second wave from September 2020 (growing at an exponential rate until new containment measures in November 2020 reversed this trend to some extent).

At the moment, four different types of vaccines have been approved and started to be used in Italy: the one from Pfizer-BioNTech (at the end of December 2020), the Moderna one (at the beginning of January 2021), the Oxford-AstraZeneca one (at the end of January and temporarily suspended for some days in mid-March 2021), and Johnson & Johnson's (at the end of April 2021). Other vaccines, such as Sputnik V, have yet to be used, or are pending approval. On May 1, the Italian government claims to have supplied 19,949,067 doses of the vaccine, with a total of 5,955,692 people vaccinated with the two necessary doses.

Frontline health professionals, care home employees and patients, and over-80s are prioritized in Italy's vaccination program. After that, the vaccine will be made available to other groups. Italy has designated March 18 as a national day of remembrance for the victims of COVID-19.

## ECONOMIC IMPACT

In regard to the GDP, Italy presented a downward difference with respect to 2019 in its four trimesters: respectively -5.4%, -17.7%, -5% and -6.6%. Upward trends could be observed in the third one, mainly in the summer, but only in contrast to the disappearance of the main containment measures.

During the last quarter of 2020, short-term decreases of 2.8% have been perceived in agriculture, 0.3% in industry, 2.5% in construction and 2.3% in the services sector, especially damaging commerce, hospitality and the arts. Family consumption has decreased by 4.4%, with a generalized consumption directed at perishable products compared to imperishable ones.

Despite the temporary ups and downs of employment throughout the year (with a rise of around 470,000 jobs lost), December 2020 registered an increase of 1.9% in unemployment, with around 444,000 more people unemployed only in that month.

## SOCIO-POLITICAL IMPACT

Studies generally show that the social impact of COVID-19 is borne on previously disadvantaged groups, such as women, immigrants or those below the poverty line. In general, it has fostered greater inequality than the previous status quo, with the danger of eroding previous social cohesion. Surveys show that, after the contagion and possible consequences of the COVID-19, the main fear of those interviewed was the loss of livelihoods, a specific point within the more diffuse consideration of instability and fear of the future.

To all this is added to a certain extent the possible psychological consequences even of those not affected by the virus, which could bring long-term complications. The burn situation of health professionals also poses a social risk in the future, but the assumption of the psychological problem caused by the feeling of fear, insecurity and socioeconomic instability also raises its own problems (fatebene).

In addition to the problems of national mourning, there has been a powerful disenchantment with European solidarity at the beginning of the crisis. Although Italy finally received € 209 million as part of the loan from the European Recovery Fund, popular sentiment is of reluctance to give aid to one of the countries hardest hit by COVID-19, and with a recognisable difficult economic recovery due to its tourist base. In general, the measures taken by the government have the majority of approval from the public, although most irregularly on the provincial ones, and there is a certain increase in the support for more authoritarian political measures or "stronger leadership".



## IMPACT ON MULTILATERALISM

### EU integration:

Since political preferences in Italy have been considerably affected by the widespread concerns over immigration flows and dissatisfaction with the solidarity shown between the EU Member States in fighting the pandemic, populist parties could enjoy majoritarian support in the government. Russian "COVID-19 diplomacy" - provision of the medical supply to Italy at the beginning of COVID-19 outbreak and more recent intention to produce Sputnik vaccine in northern Italy - can further polarise Italian politics and its standing in the EU.

The long-run stagnation of the Italian economy, in combination with the large public debt, would have had serious spill-over effects over the European financial markets. Financial assistance by the EU institutions through economic rescue plans, such as the 'Pandemic Emergency Purchase Programme' (PEPP), Next Generation EU (NGEU) plan will be a vital relief for Italy. However, there is a high risk that these relief programs hit the entrenched social and political bottlenecks.

### NATO and EU defense:

Italy, which has been severely impacted by COVID-19, limited its military contributions around the world. Italy has a leading role in NATO missions in Lebanon, Kosovo, and Somalia – there are approximately 7,000 Italian military personnel deployed in 24 missions and 16 operations across 24 countries. Given the heavy economic toll of COVID-19, the Italian Ministry of Defense made numerous reforms in regard to these international commitments: operational activities in Kosovo and Lebanon have been reduced, some personnel have also been removed from NATO operations in Afghanistan and Iraq and the Italian military training in Iceland has been rescheduled.

Italy is also among EU countries, which suffered most from COVID-19-related cyberattacks. Since cyber threats continue to grow and adapt, they underline the importance of cybersecurity, threat intelligence, capacity building, and communication at the EU level and bring institutional gaps into view.

Italian transatlantic relationships, including relations with NATO, deteriorated under Trump's government due to the tensions around defense spending (Italy's defense expenses are below 2% of GDP) and his uncoordinated actions in North Africa and the Middle East. Here is hope that Biden's administration will restore trust between transatlantic allies.

## INFLUENCE OF CHINA

Strengthened BRI ties after the signing of an intergovernmental MoU in 2019, as well as China's 'mask diplomacy' and its connection to the diaspora community in Italy, contributed to the turn of Italy towards China at the beginning of 2020. However, the growth of the Chinese presence in the internal market is associated with a growth in populist vote share. The approval of the Next Generation EU economic recovery plan can reduce the reliance of Italy on Chinese economic projects and turn it towards closer European cooperation.

### MOST LIKELY SCENARIO

The 2020 Report's conclusion holds: Italy will continue to benefit from EU funds. Long-term recession in the Italian economy, along with the country's massive public debt, may have had significant ramifications for European financial markets. EU economic rescue plans will be a vital relief for Italy. However, there is a high risk that they will hit the entrenched social and political bottlenecks and may even feed them.

### WORST CASE SCENARIO

The economic burden of the COVID-19 pandemic and growing unemployment and the rise of populist parties puts Italy's social fabric at risk of tearing. Growing dependence on EU financial aid in combination with Chinese and Russian factors leads to political collapse and weak coalition government. Fragmentation of decision-making processes, coupled with the modest progress of the government's temporary and ad hoc solutions in reaction to the COVID-19 crisis, could contribute to a political stalemate.



# GREECE: COUNTRY PROFILE AND FORECAST

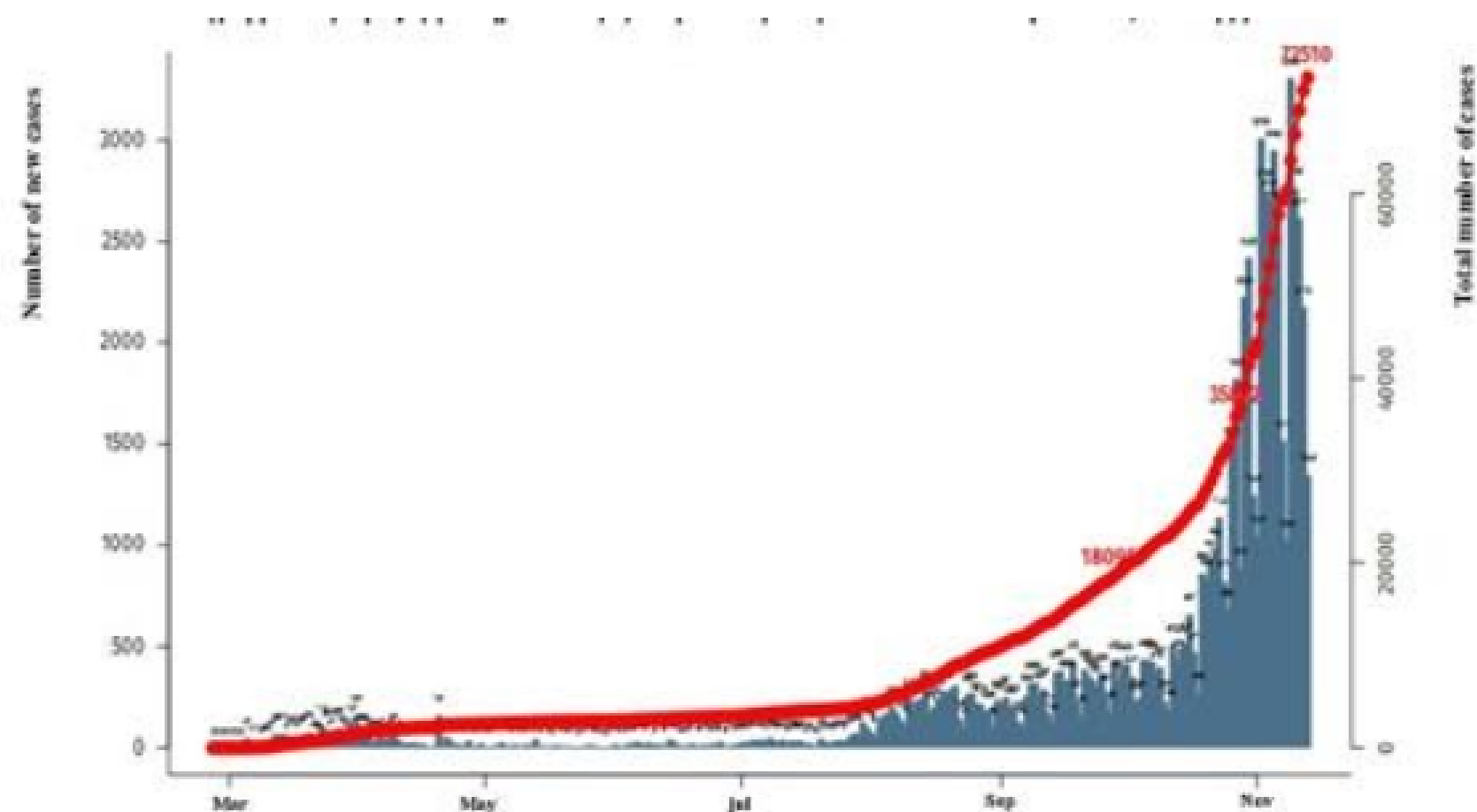
IASON LAVDAS

## INTRODUCTION

The optimism which existed in Greece from May 2020 until September 2020 was only temporary. Although the tourism sector in Greece continued to operate on a smaller scale during the summer of 2020, tourist presence was not the primary reason for the rise of COVID-19 cases in Greece. The reluctance of the Greek people to comply with lockdown restrictions resulted in a great increase of COVID-19 infections and caused the initiation of intensive political debates regarding the enforcement of a new lockdown (similar to the one of the March-May period.) The new lockdown was enforced on November 6 and until that date, the number of COVID-19 cases in Greece was 52,254.

One week after the initiation of the lockdown, the cases increased to 72,510 and the total death toll was raised to 1,035.

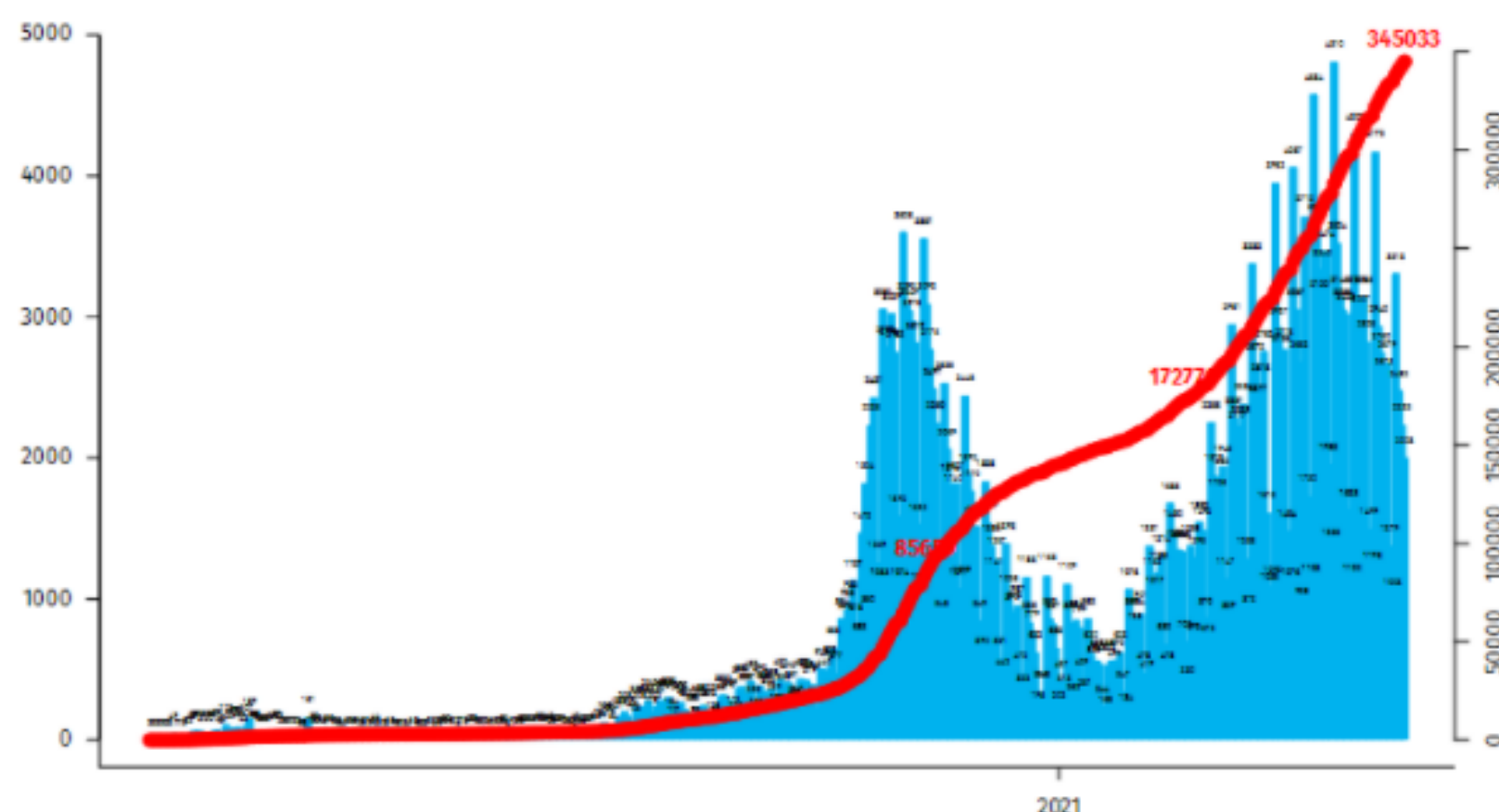
*Number of clinically verified COVID-19 cases in Greece, November 14, 2021*



*Left scale: number of new cases, right scale: total number of cases*

It is important to mention that the Greek government had failed to address two very important challenges. The first, was the necessity for the immediate continuation of the hospitality sector, and secondly was the reluctance of the Greek people to follow the restrictions imposed. For several reasons, the government failed to implement decisive measures to ensure that the retail market could operate, causing a great number of small and medium businesses (restaurants, bars, etc.) to stop operating. Furthermore, the aforementioned reluctance of the people was neglected, resulting in an increase in COVID-19 infections despite a full lockdown being implemented. Until January 31, the number of cases per day was relatively small, yet enough to guarantee that the lockdown would be extended. The number of total cases until January 31 was approximately 157,000.

*Number of clinically verified COVID-19 cases in Greece, April 30, 2021*



*Left scale: number of new cases, right scale: total number of cases*



Until today (April 30, 2021) the number of total COVID-19 infections is 345,033. In the following sub-chapters, there will be brief explanations about the implications of the second wave of the COVID-19 pandemic on the Greek economy, society, and politics.

#### ECONOMIC IMPACT

The COVID-19 pandemic and in particular, the second wave of the pandemic has caused serious economic implications to the Greek economy, worsening the situation caused already by the 10-year debt crisis. Despite the numerous governmental and EU financial initiatives aiming to support the Greek economy, the economic impacts of the COVID-19 pandemic were only slightly tackled. The greatest impact was on the hospitality sector. The COVID-19 pandemic was able to stop the economic recovery which started in 2017. According to the Bank of Greece, in the external sector, the deficit in the period of January-September 2020 was increased by 8.5 billion euros mainly because of the significant reduction of travel and transport services. In terms of unemployment, there was a 5.8% increase of the unemployed compared to December 2019 and a 3.2% increase compared to November 2020. Compared to December 2019, the number of people who are neither working nor looking for work (also referred to as "economically inactive") increased by 51,573 people compared to December 2019 and by 34,611 people compared to November 2020.

#### SOCIO-POLITICAL IMPACT

The increase of COVID-19 cases in Greece from January 2021 to March 2021 is a strong indicator that the people were incapable of following the restrictions of the imposed lockdown. There are numerous records of video footage from Greek news agencies showing people gathering in outdoor spaces and engaging in outdoor activities - essentially proving that the Greek people got tired of being self-isolated. Furthermore, there were several events that led people to criticize the government and its stance regarding the lockdown – people have gone as far to call the restrictions 'authoritarian.'

Firstly, there were instances where Greek politicians, or specifically, the Prime Minister, had breached COVID-19 restrictions – which made the people criticize such actions and count them as provocative. Secondly, the anger of the Greek people was building up due to the slow process of vaccination in Greece. Specifically, there is still a pessimistic view among the people regarding how effective the vaccination can be, because some EU countries have precautionarily suspended (e.g. the Netherlands, France, and Germany) the use of some COVID-19 vaccines after rumors about possible serious side effects. Additionally, the main vaccination supplier for the EU faced several production problems and has heavily reduced vaccine production, resulting in the dissatisfaction of the people and especially those working in the tourism sector. The proper operation of the tourism sector in Greece will heavily rely on how fast the vaccination process is moving forward. A high percentage of people have also pointed out a significant disadvantage of the dependence on EU-designated vaccines when in contrast, other countries have already received vaccines from Russia and China – moving forward with country-wide vaccination at a faster rate.

It should also be noted that there were cases when people were very dissatisfied with the police controls regarding the lockdown restrictions. In more extreme cases, police had used unnecessary violence against civilians and had been widely criticized. For example, on March 7 2021, a man was beaten up by police officers in the residential area of Nea Smyrni during police checks of compliance with lockdown restrictions. The amateur video showing the violent scene was rapidly shared between social media platforms (also misinterpreted by a few government-biased Greek news agencies) resulting in widespread protests against police brutality as well as in clashes between violent groups and police forces.

In a nutshell, the Greek people are somewhat dissatisfied with the government's overall management of the COVID-19 crisis in Greece.

#### IMPACT ON MULTILATERALISM

Although the vaccination process in the EU is slow, Greek-EU relations are unlikely to change, especially since Greece relies upon EU special funding programs to overcome the economic impact of COVID-19. As for the Greek contributions to NATO (more than 2% of GDP), these are also unlikely to change since Greece is committed to the NATO Alliance.

#### INFLUENCE OF CHINA

The cooperation between China and Greece will continue to remain strong during the vaccination period and after the COVID-19 pandemic. The bilateral agreements committed to the enhancement of that cooperation remain vital to the Greek economic interests. Overall, the Greek business sector is willing to accept any potential financial contributions from China.

#### MOST LIKELY / WORST SCENARIO

Greece was not able to manage the second outbreak of COVID-19 as effectively as estimated in last year's report. The optimistic view that Greece could stand strong against the second wave of COVID-19 cases was the main reason why Greece failed in the process. Almost all deprivations of the first lockdown period (March 22-May 5) were essentially wasted because the people did not follow the restrictions imposed during the summer (social distancing, post-midnight traffic prohibition, etc.) as well as because the police failed to entirely enforce those restrictions (some bars and clubs were secretly operating after midnight). In a best-case scenario, Greece can still turn the tides of this crisis and pursue the economic revival of the Greek tourism sector during the late May-October period. The worst-case scenario involves a great delay of the vaccination process, creating further issues for tourism and the wider hospitality sector in Greece.



# HUNGARY: COUNTRY PROFILE AND FORECAST

PELAYO FERNÁNDEZ GARCÍA

## INTRODUCTION

Unlike other European Union members, Hungary was comparatively less affected by the first wave of the COVID-19. Despite this, as of May 1 2021, its figures for COVID-19 are 781,299 infected, with 236,572 active cases, 27,701 deaths, and 517,026 recoveries.

The health authorities indicate that the country is in a critical position, and urge the population to follow hygiene measures and to participate in vaccination campaigns. The Hungarian government has carried out 5,394,652 COVID-19 tests, and among the 4,023,137 people who have received a dose of a vaccine against the virus, 1,948,728 persons have already received the two prerogative doses.

Currently, Prime Minister Viktor Orbán maintains the mandatory use of masks and other socialization restrictions, encouraging teleworking where possible. Shops may reopen between 5:00 a.m. and 9:30 p.m., but there must only be one customer per 10 m<sup>2</sup>. Terraces of bars and restaurants may open until 9.30 p.m. and the curfew will start at 11 p.m. These restrictions have been carried out by the Hungarian police through the imposition of fines and the closure of businesses not complying with this regulation.

Immunity certificate holders will be able to visit theaters, cinemas, gyms, swimming pools, zoos, museums, libraries, and sports events. Hotels and the indoor premises of restaurants may also welcome guests who have been vaccinated or recovered from COVID-19.

## ECONOMIC IMPACT

In early March 2021, the Hungarian economic ministry indicated that the government must react to the real needs of the economy and that they were still waiting for the relevant information from the Chamber of Industry and Commerce. In any case, on March 18th the Prime Minister announced several future economic measures, such as the suspension of loan payments until the end of the year, the extension of short-term loans for companies, the control of interest rates, the suspension of some specific taxes, and the relaxation of labor rules.

Some data suggest that 2020 has not only been the worst year for the Hungarian economy since 2010 but is possibly among the worst five years of the last 100. The recession resulting from the COVID-19 crisis was projected on a 6% reduction in its GDP. However, because the crisis has been artificially created by governments to avoid greater evils due to COVID-19, most experts consider that the recovery could be faster than that of the last economic crisis suffered by the country.

The forecasts, among others, of the Hungarian National Bank and the International Monetary Fund, suggest that Hungary could return to economic growth even this year, and even reach the previous levels of 2019 in 2022. Those hopes of recovery are intensified by the fact that the country will be part of the efforts of the European Union's recovery packages, although the process will depend on the speed at which the sectors most affected by the pandemic can be reactivated, and whether it will be able to reactivate tourism for the summer. Although the unemployment forecasts were 6.1% by the end of 2020, the year 2021 finally began with only 4.7% and is expected to fall to 3.9% by 2022.

## SOCIO-POLITICAL IMPACT

The country's financial situation has affected the popularity of the governing coalition Fidesz-KDNP, something not surprising since Orbán's leadership has generally been favored in parallel with the country's economic improvement. Although its popularity is not purely for economic reasons (economic growth in 2019 exceeded the European average, and even so the coalition lost the vast majority of the most important cities), the fact is that polls calculate that it had lost more than half a million voters since August 2020.

As expected, the Hungarian parliament extended the "state of danger" legislation initially created by the pandemic emergency at the end of February, thus allowing the government to begin ending the state of danger without parliamentary support, although the approval of these decrees only have a validity of 90 days. However, the new laws also establish that neither elections nor referendums can take place during such a state of danger.

The opposition, which for the first time since 2010 has some possibility of a political comeback, has accused the Hungarian government of abuse of power in these extraordinary circumstances. Currently, the ruling party already has a large majority to allow it to carry out any policy, but if it decided to take initiatives to further benefit from electoral laws, it could achieve the opposite by mobilizing both opposition voters and the undecided vote.

In this sense, the Orbán government is expected to be based on the effective measures taken during the COVID-19 crisis, its policy of fear around immigration issues, and its tendency to protect Christian culture as opposed to others, including the rejection of gender policies and LGBT rights.

## IMPACT ON MULTILATERALISM

The strong bet of the Orbán regime in the political trend advocated by the United States of America by President Trump means that his defeat in the new legislature is bad news for Hungarian right-wing populism. At the same time, dissent with his closest political colleagues in the European Union, the European People's Party, continues, especially after various political scandals, without the EPP considering Fidesz to properly fit within their plans for the European political conglomerate.



If he were openly expelled from it, it would mean a significant reduction in Orbán's international prestige and initiative on the European Parliament. Likewise, the replacement of Angela Merkel as German Chancellor can vastly alter the Hungarian prime minister's relationship with the European Union, and Orbán has already shown himself to use anti-European rhetoric for his purposes before. The fact that Hungary was the first country in Europe to accept the Sputnik V vaccine from Russia, as well as its recent gas deal, could lead to a political position more aligned with the Eurasian giant than with the European Union.

#### INFLUENCE OF CHINA

Concerning the above, Hungary has also made an effort to obtain COVID-19 vaccines from China, which has already begun to be implanted in its territory, the first country within the European Union to accept it. In the summer of 2020, US diplomats already pointed out the growing interest of great powers such as the United States, Russia, or China in Hungary, a theory confirmed by the economic cooperation pact signed between Hungary and China in August of the same year.

The signing of this treaty seeks to reactivate economic cooperation between both nations after the COVID-19 crisis. The ministerial representatives of both countries valued the cooperation capacity between both, with China as the second most important source of Hungarian imports, and Chinese companies have invested more than \$ 5 billion at the moment, half of the Chinese investment in all countries of Central Europe and Eastern Europe.

Despite this, new investments are still foreseen in the next five years, as well as financial and banking cooperation between both nations, and the construction of a campus of Shanghai Fudan University in Budapest in 2024, to turn the country into an education center in the region.

They have also collaborated intensively during the COVID-19 crisis, with China sending Hungary more than 90 million masks, 40 million protective suits, and 800,000 doses of COVID-19 medication, and they are expected to receive 1 million doses of the Chinese vaccine between March and April and 3.5 million more in May. All of these policies are connected with China's Belt Trade strategies and the Road Initiative, regarding Hungary as China's eastern gateway to Europe.

#### MOST LIKELY SCENARIO

To date, the COVID-19 pandemic has not hit Hungary as hard as other European countries, and vaccination campaigns appear to be progressing apace; however, so does the spread of the virus. Economic growth in GDP is already showing and is also forecast towards 2022, as Hungarian and European financial aid help to keep the economy going. The foreign policy of the Hungarian government seems to be working on two fronts: very possibly the anti-European rhetoric will continue, although the stay in the EU benefits the country, although, in the event of possible disruption, ties will continue to be strengthened with Russia and especially with China, to have an alternative with international support. Despite the increases in restrictive measures and vaccination, it is unlikely that by the summer the country will reactivate the tourist economy, which together with the attempts of greater control by the Orbán government, may favor the strengthening of the opposition for the general elections of 2022.

#### WORST CASE SCENARIO

Whether due to a break with the EPP or a worsening of international relations with other even less like-minded European politicians, Orbán could decide to focus his policy towards a genuine anti-Europeanism. This could take place for several reasons, including increased pressure from Europe to curb Hungary's current authoritarian and reactionary trend, and/or a reduction in European aid funds, which bear much of the economic stability and popular support of his government. In a populist turn towards self-determination, Orbán could carry out a direct campaign to encourage exit from the European Union, in a movement backed by the increasing intensification of trade relations with China, which sees the European country as a bridge of entry of its influence on the continent.

l conglomerate.





# STRAT&SEC

UOFG STRATEGY AND SECURITY  
SOCIETY



# APPENDIX

## SOURCES PER COUNTRY

### THE UNITED KINGDOM

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