

**ANNUAL REPORT
2018**



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Foreword

**HERMAN
VAN ROMPUY**

President

As the politico-institutional cycle entered its final year, 2018 was both an opportunity to take stock of the past and to look towards the future. The European Policy Centre (EPC) did just that, presenting workable policy solutions founded on evidence-based analysis, while also looking to start the conversation about what a new blueprint for Europe might look like in the years to come.

I would like to pay tribute here to the EPC's tireless efforts to continue the search for new and innovative ways to advance the European integration project, including the new task forces on the shift towards a circular economy and the merits of an EU industry action plan.

The EPC also doubled down on engaging citizens in EU decision-making, facilitating a genuine transnational dialogue between Brussels and the member states on the future of the European Union.

With the Connecting Europe project in particular, the EPC sought to empower European citizens and experts to present their ideas and actively engage with EU policymakers in Brussels.

As in previous years, I have had the pleasure of working with a dedicated and talented group of individuals, ably led by Chief Executive Fabian Zuleeg. I would like to congratulate all the members of the EPC's dedicated team for another successful year. This annual report features the highlights of their activities, showcasing our organisation's convening power, expertise and impact on the EU policy agenda.

I firmly believe that think tanks such as the EPC play an invaluable role in promoting sincere and constructive debates in Brussels and beyond. Amid growing polarisation, they must continue to remind us of the importance of long-term, strategic thinking, of fact-based policymaking, and most importantly, of the art of compromise.

The EPC is well equipped to meet these challenges and I look forward to being involved in this important endeavour in 2019 and beyond.



FABIAN ZULEEG

Chief Executive

Message from the Chief Executive

2018 was another successful year for the EPC. We continued to build on our reputation of providing quality analysis and debate with a swathe of publications and a record number of events.

Alongside our ongoing programmes, Brexit was a major focus of our activities, reflecting the importance and intensity of the negotiations.

While Brexit occupied much of the political discourse, we also remained mindful of the longer-term challenges facing the Union, particularly the many questions surrounding the EU's funding in the next political and institutional cycle, but also global challenges such as climate change, security and migration.

We also continued to strengthen cooperation with our many longstanding partners, such as the King Baudouin Foundation, whilst remaining open to new partnerships and projects and extending our outreach beyond Brussels.

We are grateful to them as well as the many member organisations who continue to support us and contribute to our work. We remain dedicated to providing them with the best possible analysis and events.

I would also like to thank our dedicated and hardworking team of analysts and support staff. It is impossible to give justice to all of their efforts in 2018 in this annual report, so in the following pages we have selected some of the highlights, which I hope you will enjoy reading.



**JANIS A.
EMMANOULIDIS**

Director of Studies

The EU in 2018 - A tale of two narratives

Five years after the start of the 'last chance' Commission headed by Jean-Claude Juncker, one can tell two seemingly opposing tales about the state of the Union in 2018.

One is an optimistic tale of a surprising comeback. Despite the turmoil of recent years – the eurozone crisis, the migration/refugee crisis – the Union has shown an extraordinary level of resilience. It has been able to resist the many forces of disintegration pulling at the Union and its members since 2008. Many prophets of doom predicted the EU's collapse – they have been proven wrong time and time again.

At critical times during the 'polycrisis' the EU and its members accomplished things together that would not have been feasible before. Yes, the responses have often been slow, insufficient and sometimes ill-advised. However, the EU and its members have individually and collectively made remarkable efforts and, at times, painful adjustments in response to the severe challenges of the past decade.

In doing so, they often showcased unity and a shared sense of purpose. This was true in the case of Brexit, with respect to maintaining consensus on the economic sanctions against Russia, and regarding the Union's collective response to US President Donald Trump. The

Union made it clear to the rest of the world that it is ready to defend the rules-based multilateral system.

Buoyed by more than five years of continuous economic growth in Europe, and alarmed by the fallout from the Brexit vote, there is a growing number of citizens who are in favour of their country's EU membership. People are realising that the 'costs of non-Europe' could be very high indeed, and a clear majority wants their country to remain in the EU and the eurozone.

All of the above is a testament to the Union's positive track record in recent years. However, there is also a gloomier tale to be told.

Years of crises and last-minute reprieves have left their mark. Fragmentation and distrust have increased significantly among member states, and between national capitals and 'Brussels'. This is not a new development – but it is becoming a core element of Europe's integration narrative. The notion that the Union is unable to overcome the structural differences and fundamental schisms dividing EU countries and citizens is spreading. Mutual accusations of a lack of solidarity have further deepened divisions.

This divide also manifests itself in growing economic inequality. While some countries have managed to weather the financial

and economic storm, many others are still struggling. Living standards and social conditions vary significantly across Europe, both between and within countries. Real and perceived social divisions have widened.

There is a growing sense of social injustice, which has fuelled indignation, despair and even anger in many parts of society. National societies are seeking a new socio-economic balance, but struggle to reach a new equilibrium, which in turn has led to a high level of political and societal volatility in the EU27. All of this undermines traditional social contracts and may even endanger social peace within countries and between generations.

Not only the political elites but societies as a whole, too, are affected, with an unprecedented resurgence of national stereotyping, historical resentment and a dangerous blame game. European integration is no longer perceived as a win-win exercise from which all EU countries and their citizens profit. Authoritarian populists are threatening or even actively undermining the fundamental pillars of our open, liberal democracies.

Illiberal democracy has been on the rise for some time and the 'populist surge' continues in many EU countries. But this is not just a European phenomenon. There is much more at stake than the EU – it is about the future of our societies and democracies.

Most crucially, the EU27 have not been able to make sufficient progress in crucial areas of integration. Economic and Monetary Union reform, climate action, migration, the fight against disinformation, citizens' participation; in each of these policy areas, major efforts are still needed.

In late 2017, there was hope that the sense of optimism that had spread following the French and German elections would spark new reform momentum. In our third and final New Pact for Europe report, we argued that we believed the time had come to "re-energise Europe".

Unfortunately, the EU27 were not able to exploit that window of opportunity. Nobody knows when or even if it will re-open. As a result, the EU runs the risk of its defences being too weak to withstand future storms. New turbulences will occur, although we do not know when, where or how they will hit us.

The discussion on the next Multiannual Financial Framework for the 2021-2027 period did not substantially move things forward, either. The EU27 still have a long, rocky path ahead, and it will be left to the next EU leadership to forge a deal among the member states, probably in the second half of 2020.

All of this is happening against a backdrop of major power shifts on the global stage. There is a serious risk that Sino-American

competition will emerge as one of the main features of international affairs, with Europeans and others exposed to the shockwaves. There is a growing sense of urgency and awareness that Europeans have to assume more responsibility for their own security, both at the regional and global levels.

But despite all of the commitments expressed in public speeches, strategy papers and joint communiqués, the EU27 struggle to fulfil the expectations they have raised with respect to the Union's future role as a comprehensive and credible security provider.

The Union is much more vulnerable than other political entities given that it is not as consolidated as mature nation states. Like any other organisation, the EU is not perfect, and it is a sign of increasing maturity that today's Union is being scrutinised much more than it was two or three decades ago.

Yet on many occasions, criticism against the European project does not serve to move things forward constructively. The EU has become a popular punching bag, with many anti-EU, anti-euro and anti-migration forces using their opposition to the Union as a vehicle to achieve their ultimate objective: to strengthen their position at home.

As we enter a new politico-institutional cycle, the EU is likely to witness escalating polarisation, a 'battle of (split) camps' between those who want to push Europe towards a more illiberal direction and those seeking to defend the values of an open and pluralist society. The next EU leadership's biggest challenge will be to contain the centrifugal forces that are slowly wearing it down while not losing sight of its core principles, and attempt to "Re-unite Europe" behind a common cause.

The EPC in 2018 at a glance



200+
events



10,000+
audience members



800+
speakers

A new look:



A blueprint for the after 2019

Conference

Thursday 8 November 2018



1

1. The EPC Strategic Council on 8 November 2018



2. FutureLab participants work on ideas for their citizenship projects at the FutureLab Europe Autumn conference



2

3. A panel including Karl-Heinz Lambertz, President of the European Committee of the Regions; Gordon Bajnai, Chairman of the Global Advisory Board, Campbell Lutyens and Former Prime Minister of Hungary; Maria João Rodrigues, MEP, Group of the Progressive Alliance of Socialists and Democrats; and Janis A. Emmanouilidis, EPC Director of Studies at the New Pact for Europe conference in May 2018.



3

4. The EPC Strategic Council

5. One of four panels at the 'Europe, the United States and security cooperation in a challenging world' conference on 16 May 2018. From left to right: Roberta Bonazzi, founder





4



5



6



7

and President of the European Foundation for Democracy; Matthew Levitt, Director of the Stein Program for Counterterrorism and Intelligence, Washington Institute for Near East Policy; Irfan Saeed, Director of office of Countering Violent Extremism, Bureau of Counterterrorism and Countering Violent Extremism, US State Department; and Alexander Ritzmann, Senior Research Fellow, Brandenburg Institute for Society and Security, Co-Chair Steering Committee of the European Commission's Radicalisation Awareness Network.

6. Former UK Prime Minister Tony Blair gives his take on Brexit at the launch of our new 'Thought Leadership Forum' event series in Brussels on 31 March 2018.

7. Senior Adviser to the EPC on communications strategy Jacki Davis in full moderating-mode at 'A blueprint for the EU after 2019' conference



67 publications



50,000+ downloads



500,000+ website hits



600+ media mentions



Launch of EPC podcast

Included in top outlets:



The New York Times



theguardian

POLITICO

Le Monde



euronews.



Deutsche Welle



Re-energising Europe - Now

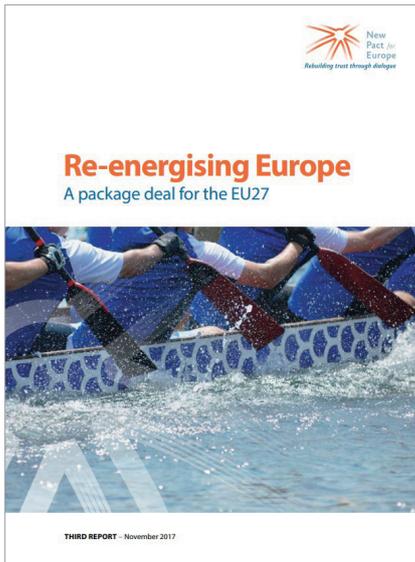
European Commission President Jean-Claude Juncker and President Emeritus of the European Council and current President of the EPC Herman Van Rompuy meet ahead of the final 'New Pact for Europe' conference in Brussels, where both delivered keynote speeches.

Influencing the agenda

IMPACT

With its timely events, in-depth analysis and innovative policy solutions, the EPC continues to reach decision-makers in Brussels and other EU capitals at critical junctures in EU policymaking.

Future of the EU



Re-energising Europe

New Pact for Europe

In 2018, our long-running New Pact for Europe (NPE) project, which began in 2013, ended its third phase. Following the publication of the third report *Re-energising Europe – A New Package deal for the EU27*, its findings were disseminated and discussed at events involving EU citizens, experts and high-level decision-makers in Athens, Belgrade, Berlin, Brussels, Budapest, Helsinki, Paris, Tallinn and Warsaw.

An intense social media campaign, including a promotional video summarising the entire project, accompanied the launch of the publication and was continued throughout 2018.

The report was also presented in person by EPC President Herman Van Rompuy and Director of Studies Janis A. Emmanouilidis to Donald Tusk, President of the European Council, as well as to Jean-Claude Juncker, President of the European Commission.

The New Pact for Europe project concluded its work, for the time being, with a final conference in Brussels on 31 May 2018, which was addressed by European Commission President Jean-Claude Juncker. He lauded the report's proposal for an ambitious but realistic package deal, and emphasised the importance of solidarity between member states in all policy areas: "We have to make sure a sense of solidarity is not lost in the EU."

Other notable speakers included Maria João Rodrigues, MEP (S&D) and Karl-Heinz Lambertz, President of the Committee of the Regions, who concurred with the findings of the third NPE report and added that "in order to re-energise the EU27, we have to convince our citizens of the European added value in their regions and cities. They must feel it in their soul, in their heart, even in their stomach, that the EU can make a difference to support them."

About New Pact for Europe

Aiming to rebuild trust

During the polycrisis of the early to mid-2010s (the financial and economic crisis, the banking and sovereign debt crisis, the geopolitical crisis in Ukraine and the worsening relationship with Russia, the migration/refugee crisis, the Brexit crisis and, arguably, a security and civil liberties crisis), it became clear that there was – and still is – an urgent need for an open and honest debate about the future of the EU at all levels of governance and, more importantly, within and between member states.

Starting in 2013, the New Pact for Europe project set out to do just that,

organising over 120 public events across Europe and setting up national and transnational expert groups in 17 countries. Based on the exchange of views, the insights gained and proposals elaborated in the 2016-2017 phase, the New Pact for Europe project put forward the idea of an ambitious yet realistic win-win package deal between the EU27, to overcome deadlocks and counter the danger of a more regressive, nationalistic, closed, illiberal and authoritarian Europe, the greatest challenge we are currently facing.

THE NEW PACT OF EUROPE PROJECT IS STEERED BY:

- ▶ The King Baudouin Foundation
- ▶ Bertelsmann Stiftung
- ▶ Open Society Foundation
- ▶ European Policy Centre

AND SUPPORTED BY:

- ▶ Calouste Gulbenkian Foundation
- ▶ Open Estonia Foundation
- ▶ BMW Foundation
- ▶ Network of European Foundations



Flagship conference

A blueprint for the EU after 2019



Looking ahead to the EU's rendezvous with its citizens at the European elections in May 2019, the EPC continued to stimulate the debate on how to restore confidence in the EU, with fresh ideas on what it should focus on in the next politico-institutional cycle.

What should be the main components of a new blueprint for the EU after 2019? That was the question at the centre of a lively and interactive

debate at our high-level conference on 8 November 2018, which featured our President and President Emeritus of the European Council Herman Van Rompuy. Other leading commentators who spoke at the conference included Anand Menon (King's College London), George Pagoulatos (Athens University of Economics & Business), Almut Möller (ECFR Berlin Office), Andrew Duff (Spinelli Group), and James Watson (BusinessEurope). Three different panels, moderated

by Jacki Davis (Meade Davis Communications), looked at different crucial issues that are likely to determine the future of the EU, such as the need for a new growth strategy for the Union and the impact of Brexit. Together with EPC experts, the panellists discussed how they see the state of the Union six months before the European elections, and less than a year before the 'changing of the guard' at the European Commission.

Upcoming projects and priorities

Strategic Council

Just before our conference 'A blueprint for the EU after 2019', the European Policy Centre's Strategic Council convened to map out the future priorities of the next EU leadership, and what, as a result, should be the main focus of the EPC's activities in the coming year and beyond.

EPC President Herman Van Rompuy and Senior Analysts sat down together with leading experts, academics, and former and current EU insiders for an open discussion on the strategic direction of the organisation in an increasingly competitive and polarised environment.

In anticipation of the new politico-institutional cycle, the EPC announced its plan to publish a new edition of *Challenge Europe*, a multi-authored, periodical publication appearing at crucial moments in the EU integration debate.

Combining a more visionary approach with concrete policy proposals, the 24th issue of

Challenge Europe, Yes, We Should!, delivers an alternative to those who cynically claim that European cooperation no longer works and should be abandoned. It argues instead that integration can still work, and that it is still the best answer to the many problems we are facing.

Beyond that, the EPC presented its research priorities for 2019: the digital transition to a circular economy; designing a new industrial strategy for Europe; the links between crime and jihadist terrorism; ensuring a level playing field after Brexit; and the importance of fixing the Single Market.

We also planned to break ground on exciting new projects, such as a task force on the discourses surrounding migration, the threat of disinformation to our democracy, the changing dynamics of global geopolitics, and how the EU should address the influence internet platforms exert on public discourse.



“Britain without Europe will lose weight and influence. But Europe without Britain will be smaller and diminished. And both of us will be less than we are and much less than we could be together.”

TONY BLAIR
FORMER UK PRIME MINISTER

Brexit

Inching closer towards the cliff edge

The EPC consolidated its position in 2018 as *the* think tank in Brussels on Brexit, producing a steady flow of analysis, events and publications on the subject. As negotiations on the UK's withdrawal from the EU intensified in the latter half of the year, so did the EPC's output on Brexit. EPC analysts studied the implications of Brexit for business, trade, citizens and the EU's future relationship with the UK.

With our timely and widely read commentaries, the EPC was able to demonstrate its unique, in-depth understanding of the EU's legal and institutional architecture, and thereby influence the debate in a meaningful way.

Not only did we look at the 'big picture' issues in terms of what the UK's departure from the EU could mean for the UK and the EU's political and economic standing in the world, and for the EU's finances, our analysts also honed down the practical and technical consequences posed by Brexit.

The Brexit Forum, supported by Amazon, the Friedrich-Ebert-

Stiftung and IKEA, looked in-depth at some of the most pressing technical and legal implications for companies that will find themselves outside of the EU Single Market.

Amid fears that London would lower social, environmental and labour standards to give its businesses an unfair advantage over their EU competitors, the EPC launched a project to look at how to ensure a level playing field for companies post-Brexit.

At the launch of the EPC's new Thought Leadership Forum on 1 March 2018, former UK Prime Minister the Rt Hon Tony Blair delivered a powerful speech opposing Brexit, underlining the damage it would wreak on both the UK and EU and calling for the British people to have a final say on the agreement reached by the EU and UK negotiators.

"... I believe the debate in the UK is only just starting to open up and we have got to find ways of averting Brexit, which is going to cause a lot of damage both to the UK and EU."

EVENTS

Sixty-Minute Briefing

Brexit without Ministers - Managing change in Northern Ireland
with David Sterling, Head of the Civil Service in Northern Ireland

Sixty-Minute Briefing

The Welsh Government's perspective on Brexit
with Carwyn Jones, First Minister of Wales

Policy Dialogue

The only real alternative to a hard Brexit is no Brexit
with Hugo Dixon, Chairman of InFacts and Deputy Chairman of People's Vote

PUBLICATIONS

Discussion Paper

Brexit: Last call
by Andrew Duff, EPC Academic Fellow

Commentary

Brexit: Stumbling over the backstop?
by Fabian Zuleeg, Chief Economist and Chief Executive

Discussion Paper

Pie in the sky and the death of 'cakeism': Towards the brink
by Fabian Zuleeg

MEDIA

Reuters – 1 March 2018

Blair, in Brussels, urges EU to help Britons stop Brexit

BBC News – 1 March 2018

Tony Blair: EU reform can change UK minds on Brexit

The Guardian – 24 November 2018

So will Europe miss the UK when it's gone? Probably not

"The economic pressure will be enormous," he said. "But we now have to negotiate the worst trade deal in history – the only one that's a reduction on what we have." - Fabian Zuleeg

The birth of a European demos?

European Politics and Institutions (EPI)

EVENTS

Roundtable in Berlin
European Citizens' Consultations

PUBLICATIONS

Discussion Paper
En Marche l'Europe? – A strategy to implement democratic conventions
by Paul Butcher, Policy Analyst, Yann-Sven Rittelmeyer, Policy Analyst and Corina Stratulat, Head of European Politics and Institutions (EPI) programme

Book
The European Citizens' Consultations Evaluation report
by Paul Butcher and Corina Stratulat

European Citizens' Consultations

With Europe's leaders searching for solutions to restore people's trust and engagement in the EU, EPC analysts set out to discover how EU decision-making could be made more democratic and transparent. They started by developing an ambitious game plan for implementing French President Emmanuel Macron's idea of holding democratic conventions across Europe.

European Citizens' Consultations Civil Society Network

With the support of the Open Society Foundations and the King Baudouin Foundation, the EPC launched a major project, the European Citizens' Consultations Civil Society Network, together with The Democratic Society, in order to evaluate the implementation of the European Citizens' Consultations (ECC) initiative in the member states. The EPC coordinated and led the Research and Evaluation Working Group within the network, carrying out more than 50 interviews with stakeholders and interested parties across Europe.

The findings led to a major evaluation report on the ECCs, which included recommendations on how the results of the process should be taken forward by the incoming EU leadership after the European Parliament elections and how it could be strengthened further. The report is the only



evaluation of its kind and attracted a great deal of attention, including from the EU institutions. Karl-Heinz Lambertz, President of the Committee of the Regions, called it an “insightful and important read”; and it was featured extensively in the *EU Scream* podcast, hosted by former New York Times correspondent James Kanter.

Thanks to the ECCs Civil Society Network and the evaluation report, the EPC is now a reference point in discussions about the consultations, as well as citizens' participation in the EU and democracy more broadly.

Building on its knowledge and reputation in the field, the EPC has embarked on a new study with the Bertelsmann Foundation as part of the ‘Democracy and Participation in Europe’ project, seeking to map and evaluate the tools of citizens' participation in policymaking at the EU level.

Enlargement to the Balkans

The transformative leverage of the EU enlargement strategy and how its institutions and member states respond to and influence the enlargement policy and process was an overarching theme in 2018.

The spotlight was put on the European Commission's new strategy for the Western Balkans at a policy debate involving European Commission Director General for Neighbourhood and Enlargement Negotiations Christian Danielsson on 3 May 2018.

EPC engaged with high-level political actors from the region, including the Prime Minister of the Republic of Serbia, Ana Brnabić, who delivered a keynote speech in December 2018, and the North Macedonian Foreign Affairs Minister, Nikola Dimitrov, who spoke

about the prospects for resolving the country's longstanding name dispute with Greece.

The fifth anniversary of Croatia's accession to the EU was the occasion for Croatian President Kolinda Grabar-Kitarović to take stock of the country's experience as the newest member state to the EU and to detail its position on further EU enlargement towards Southeast Europe.

EPC analysts also worked with organisations in the Balkan region, such as the European Fund for the Balkans, CEP Belgrade, and the Group for Legal and Political Studies in Kosovo as part of our efforts to promote the development of the rule of law and public administration reform in the region.



EVENTS

Policy Dialogue

EU enlargement to the Balkans: All on board!

with Christian Danielsson, Director-General DG NEAR, European Commission

Policy Briefing

What's in a name? The Macedonian name dispute as a test case for Balkan enlargement

with Nikola Dimitrov, Minister of Foreign Affairs, Republic of North Macedonia

Policy Dialogue

Justice reform in Albania – Laying the groundwork for a consolidated rule of law

with Etilda Gjonaj, Minister of Justice, Republic of Albania

PUBLICATIONS

Commentary

Enlargement to the Balkans: Playing hardball or playing with fire?

by Corina Stratulat

Policy Brief

How are the Balkan countries preparing their policymaking systems for membership?

by Milena Lazarević, Programme Director, CEP Belgrade and Corina Stratulat

MEDIA

Deutsche Welle – 1 January 2018
2018 decisive for the integration of the Western Balkans

Brussels Times – 11 April 2018
EU benchmarks for Western Balkans: Political will missing

EVENTS

Policy Dialogue

Europe's illiberal states: How should the EU deal with Poland and Hungary?

Connecting Europe Policy Dialogue
Populism and the politically abandoned - Why do Europeans vote for populist parties?

The President's Table

The future of Europe, democratic legitimacy and the role of the European Parliament

with Klaus Welle, Secretary General, European Parliament and Herman Van Rompuy, President, EPC



MEDIA

Bloomberg US – 7 November 2018
The EU's Biggest Party Has a Problem With Populists

"This resolution is definitely aimed at Orban and is a balancing act in trying to explain why the EPP accommodates an illiberal party within its ranks while confronting populists elsewhere," said Julian Rappold. "But this debate won't go away as long as Fidesz belongs to the EPP." - Julian Rappold, Project Leader of Connecting Europe

The Guardian – 28 December 2018
How rising populism could shake up European elections

"Many use the European elections to show a yellow or a red card to the government," [...] gains for anti-EU parties would 'create pressures at the national level' meaning that the EU's divided 27 governments are even less likely to agree on the fraught issues of eurozone reform or migration." - Janis A. Emmanouilidis, Director of Studies

Illiberal populism

The EU is founded on the principles of liberty, democracy, respect for human rights and fundamental freedoms, and the rule of law. However, across Europe, political parties and governments that put those very ideas into question are attracting more support.

To foster an honest and nuanced discussion on the subject, the EPC devoted several public events and publications to debate the reasons for the rise of illiberal democratic tendencies, in Europe and beyond; what the situation on the ground is in countries such as Hungary

and Poland; and what can be done at national and European levels to enforce democratic standards and obligations across the EU member states.

In the third episode of our podcast series *Can the centre hold?*, Director of Studies Janis A. Emmanouilidis, Policy Analyst Paul Butcher and Head of Communications Rebecca Castermans looked ahead to the EU elections in 2019, and explored the possibility of illiberal populists performing well and how that would impact EU decision-making and politics.

Securing the future of Europe's prosperity

Sustainable Prosperity for Europe (SPfE)

Industrial competitiveness

Increased competition as a result of globalisation and technological change is exerting a huge impact on Europe's industries and putting pressure on governments across Europe to support industrial champions and protect local jobs. However, the resurgence of uncoordinated industrial policies across Europe could distort the Single Market and undermine the EU's competitiveness and prosperity.

That is why the EPC organised a series of roundtables on the Single Market, urging for renewed political commitment to one of the fundamental pillars of the European integration project.

In tandem with its work on the Single Market, the EPC launched the 'Industrial Action Plan for the European Union' Task Force, which looks at how existing EU regulatory and financial tools can contribute to the development of a common strategy for transforming Europe's industrial base. Through a series of workshops and events, the task

force explored the role of different EU policies and how they can be enhanced to achieve this overall aim.

Fabian Zuleeg, EPC's Chief Executive and Chief Economist, presented our research on a new industrial strategy for Europe in late December 2018 at the 6th Ministerial Conference of Friends of Industry in Paris, which was hosted by the French Minister for Economy and Finance, Bruno Le Maire.

Also present were Le Maire's counterparts from Italy, Germany and Spain; namely Luigi Di Maio, Peter Altmaier and Reyes Maroto respectively. The conference has become an essential platform for bringing together member states advocating for a strong industrial base in Europe, and we were honoured to be able to participate, share our expertise and prompt EU leaders to endorse a bold agenda for European industry.

EVENTS

Policy Dialogue

25 years of the Single Market with Lowri Evans, Director-General for Internal Market, Industry, Entrepreneurship and SMEs, DG GROW, European Commission

Policy Dialogue

After the 2050 strategy review: What role for European industry?

PUBLICATIONS

Policy Brief

How do industrial transitions succeed?

by Robin Huguenot-Noël, Policy Analyst, Alison Hunter, Senior Adviser to the EPC, Marta Pilati, Policy Analyst and Fabian Zuleeg, Chief Executive and Chief Economist

Commentary

A new future for European industry

by Johan Bjerkem, Policy Analyst, Marta Pilati, and Fabian Zuleeg.

PUBLIC APPEARANCES

In October 2018, Annika Hedberg presented the findings of the 'Industrial Action Plan for the EU' Task Force at the expert discussion on EU industrial policy within the framework of the National Convention in Prague.

The circular economy

EVENTS

Policy Dialogue

Plastics in a circular economy - Turning challenges into opportunities

PUBLICATIONS

Commentary

How the Circular Economy can benefit from the Digital Revolution

by Romain Pardo, Policy Analyst

PUBLIC APPEARANCES

In September 2018, Annika Hedberg was invited to discuss the EPC's 'Digital Roadmap for Circular Economy' project and present some of its findings at the European Commission's 'Sustainable Products in a Circular Economy' conference.

The EPC has long advocated policies that promote the smarter use of resources whilst simultaneously reducing the environmental impact of our economic activities. Digitalisation can help speed up the transition to a more sustainable, circular economy.

With that in mind, the 'Digital Roadmap for a Circular Economy' Task Force explores how digitalisation and innovative technologies can support the transition to a circular economy.

Supported by a broad range of stakeholders, the Task Force brought leading experts and innovators around the table in a series of workshops in 2018 with a view to produce a roadmap for action at the EU level that will boost the synergies between the circular economy and the digital agenda. The Task Force's findings will be published at the end of 2019.





Climate and energy

The fight against climate change and the Union's energy policy are inextricably linked. The EPC's Climate and Energy Platform therefore brings the two policy areas together, aiming to promote discussion on how the EU and its member states can achieve a positive and successful transition to a low-carbon economy.

Our efforts focused on proposing concrete initiatives aimed at reducing

global emissions, fighting climate change locally, securing energy supplies, promoting wider socio-economic interests, forecasting global energy demand and increasing competitiveness.

We also looked at the geopolitical implications of the EU's energy policy, most notably in relation to Nord Stream 2.

EVENTS

Policy Dialogue

Is the Emission Trading System fixed?

Policy Dialogue

The road to 2050: Assessing the energy prospects for a low-carbon economy

Policy Dialogue

Making the bioeconomy a key driver in smart climate change mitigation

Policy Dialogue

Plan it right: Fighting climate change through 2050 strategies

Policy Dialogue

COP24 – Outcomes and next steps

Thought Leadership Forum

Sustainability and competitiveness: Two sides of the same coin?

with Gunter Pauli, founder, Zero Emissions Research and Initiatives

PUBLICATIONS

Issue Paper

Nord Stream 2: Rule no more, but still divide

by Marco Giuli, Policy Analyst

MEDIA

New York Times – 11 July 2018

Germany Imports Gas From Russia. But Is It a 'Captive'?

Politico Pro – 8 November 2018

Commission continues the hunt to complicate Russia's Nord Stream 2 pipeline

EVENTS

Policy Dialogue

Addressing the impact of globalisation and technological change: What role for the EU budget?

PUBLICATIONS

Commentary

Squaring the MFF circle: How match funding can deliver

by Fabian Zuleeg

Commentary

The next EU budget: Firmly rooted in the past?

by Annika Hedberg

PUBLIC APPEARANCES

In early 2018, Fabian Zuleeg spoke at the high-level conference on the EU budget 'Shaping our future: Designing the next multiannual financial framework' organised by the European Political Strategic Centre and the European Commission in Brussels.

Fabian Zuleeg also shared his views at the panel debate on 'The future of EU budget: How to reform for better spending' at the conference 'The next EU budget: Time to reform?' organised by the European Commission Representation in Romania in Bucharest, in March 2018.

The EU budget

In 2018, the European Commission came forward with its proposal for the next Multiannual Financial Framework (MFF). Given that the EU budget will determine the Union's priorities for the next politico-institutional cycle, and with the 2030 deadline to reach the targets under the Climate and Energy Framework fast approaching, it is absolutely crucial to get it right.

The Commission's proposal was therefore the subject of many of our activities in 2018. Stefan Lehner, Director of Revenue and Multiannual Financial Framework of DG BUDGET came to the EPC to present and discuss the proposal in detail.

And as part of our ongoing 'The President's Table' event series, Alexander Stubb, Vice-President of the European Investment Bank discussed the possibilities for reform in the next MFF.

In an op-ed that was published in the leading Finnish daily Helsingin Sanomat, Annika Hedberg argued that the next MFF should make a more radical break from previous EU budgets, and end the financing of activities that could be harmful to the environment and climate agenda, including some aspects of the Common Agricultural Policy. It triggered a public debate in Finland, even eliciting a response from Jari Leppä, the Minister of Agriculture.



Social protection in the 21st century

Social Europe and Well-Being (SEWB)



The future of work

Globalisation, automation, digitalisation and artificial intelligence are transforming the world of work and fuelling fears about the future of the labour market, people's livelihoods and the resilience of the social fabric of our communities. The EPC's ongoing project 'The future of work: towards a progressive agenda for all' seeks to address these issues by looking at how societies and communities can anticipate these changes and better equip themselves to manage these ongoing transformations, and reap the rewards.

Within this overarching project, the EPC launched a new task force on social protection in the 21st century, with

its partners the Confederation of Independent Trade Unions, Zurich Insurance and the World Employment Confederation. The task force studies the impact of labour market transformations on the functioning of the welfare state, bringing together experts, academics, policymakers, employers, practitioners, social partners and innovators.

Among the issues covered in 2018 were access to social protection for people in new forms of employment, different social protection regimes across Europe and where national reforms are heading, and new delivery models of social protection, particularly with regard to non-standard workers.

EVENTS

Head-to-head

Universal basic income v. a European minimum income: Finding the best answer to Europe's social challenges with Yannick Vanderborght, Professor of Political Science at Université Saint-Louis; and Anne Van Lancker, Policy Coordinator for European Minimum Income Network

Task Force meeting

Social protection in the 21st century: What are the gaps and challenges?

PUBLIC APPEARANCES

On 7 March 2018, Head of the Social Europe and Well-Being programme, Claire Dhéret, gave a keynote address at an event organised in Brussels by the European Confederation of Independent Trade Unions (CESI) and the Representation of Baden-Württemberg, discussing the impact of digitalisation on new forms of employment and the consequences for the social security system.

PUBLICATIONS

Commentary

European Pillar of Social Rights: Member states must shoulder the responsibility of delivery

by Claire Dhéret

MEDIA

Lalibre.be – 1 February 2018

Salaire minimum: un pilier de l'Europe sociale difficile à construire

PUBLIC APPEARANCES

In the late spring of 2018, Claire Dhéret spoke at an international conference organised by the Henrich Böll Foundation in Berlin, where she exchanged views on the future of EU social policies alongside Vladimír Špidla, former European Commissioner for Employment, Social Affairs and Equal Opportunities.

Strengthening the social dimension of EU policies

One of the driving questions of the SEWB programme is how the EU can close the gap between the rhetoric about 'Social Europe' and the implementation on the ground in the member states, against a backdrop of rising inequality, insecurities and euroscepticism. In a timely Commentary ahead of the tripartite social summit, *European Pillar of Social Rights: Member states*

must shoulder the responsibility of delivery, Claire Dhéret reminded the member states of the importance of shouldering their responsibility in fostering social convergence. She also argued that the costs of a non-social Europe could potentially lead to a political backlash from citizens in the next European elections.

Energy poverty

The EPC is part of a European consortium led by the University of Manchester that developed and helped launch the EU Energy Poverty Observatory as part of EU efforts to address energy poverty in Europe. The Observatory aims to provide a user-friendly and open-access resource to promote public engagement on energy poverty, disseminate information and good practice, facilitate knowledge sharing, as well as support informed decision making at local, national and EU levels. The Observatory was launched on 29 January 2018 by European Commission Vice-President for the Energy Union Maroš Šefčovič and Commissioner for Climate Action and Energy Miguel Arias Cañete.



Health (CHES)

The EPC continued to promote debate and carry out research on the sustainability of European healthcare systems thanks to the support of Johnson & Johnson, under its well-established Coalition for Health, Ethics and Society (CHES).

Chaired by Hans Martens, EPC Senior Adviser, CHES fosters a dialogue with relevant stakeholders on how to optimise the role of the EU in health policies.

As in previous years, representatives from the Council Presidency – this year, Romania and Austria – came to present their presidencies' respective priorities for health.

Other pivotal themes this year were the need to shift to more patient-centred care and the EU's role in harnessing digital innovation in health care, while also addressing its limits.

CHES also looked at the added value of member state cooperation on drug pricing and policies. During a Policy Dialogue with Belgian Minister of Public Health & Social Affairs Maggie De Block, a panel of experts, including representatives from the European Parliament and the European Federation of Pharmaceutical Industries and Associations discussed the lessons from the BeNeLuxA initiative.

EVENTS

CHES Policy Dialogue
Giving a voice to patients for more value-based healthcare

CHES Policy Dialogue
Integrated care: Tackling fragmentation for more patient-centred and sustainable healthcare

Policy Dialogue
Fostering member state cooperation on drug pricing and policies – Lessons from the BeNeLuxA initiative
with Maggie De Block, Minister of Public Health & Social Affairs, Belgium

PUBLICATIONS

Digital health: How can the EU help make the most out of it?
by Simona Guagliardo, Policy Analyst



Changing dynamics on the global stage

Europe in the World (EIW)

PUBLICATIONS

Commentary

The US and the EU need a stronger dialogue on Russia sanctions

by Paul Ivan, Senior Policy Analyst

EVENTS

Conference

Europe, the United States and security cooperation in a challenging world

Transatlantic relations

The state of the EU-US relationship was another important area of focus for the EPC. In partnership with the United States Mission to the EU, a number of events were organised throughout the year covering various aspects of importance to the transatlantic relationship.

Most notable among these were a breakfast event with the

US Ambassador to the EU, Gordon Sondland, as well as a major conference that took stock of the convergences and divergences in the EU and US approaches to security.

The EPC also hosted Jocelyn Kiley, Associate Director for U.S. politics research at the Pew Research Centre, to discuss the American public's views in the run-up to the US midterm elections of 2018.





Countering terrorism and radicalisation in Europe's neighbourhood and beyond

Together with the European Foundation for Democracy (EFD), the EPC organised a series of events on the challenges of homegrown radicalisation in Europe's communities, including in schools, prisons, mosques and among young people, drawing on national experiences across Europe.

Two years after the Brussels terrorist attacks in 2016, EPC and EFD organised a high-level conference to review how European governments' policy and operational responses have evolved since 2016, with a special focus on the role of grassroots organisations and local actors, as well as the foreign policy dimension in addressing radicalisation and violent extremism. Among the speakers were European Commissioner for the Security Union Julian King, Belgian Foreign Minister Didier Reynders and EPC President Herman Van Rompuy.

The EPC and the Friedrich-Ebert-Stiftung EU Office in Brussels partnered on a research project on terrorism and radicalisation in Europe's neighbourhood. This involved assessing the overall effectiveness of the EU in helping to address the root causes and impact of terrorism and radicalisation in several critical countries in the EU's vicinity: Albania, Bosnia- Herzegovina, Kosovo, Lebanon and Tunisia.

The resulting publication *Fighting terrorism and radicalisation in Europe's neighbourhood: How to scale up EU efforts*, authored by Senior Policy Analyst Amanda Paul and Policy Analyst Francesca Fabbri, aims to identify lessons learnt and best practices, as well as possible failures and room for improvement.

EVENTS

Policy Dialogue
The Radicalisation Awareness Network: Assessing its impact and potential

Workshop
Between God and Mammon – The crime-terror nexus

Policy Dialogue
Fighting radicalisation in prisons - What more needs to be done?

PUBLICATIONS

Book
Fighting terrorism and radicalisation in Europe's neighbourhood: How to scale up EU efforts
 By Francesca Fabbri, Policy Analyst and Amanda Paul, Senior Policy Analyst

EVENTS

Roundtable

European and Chinese industrial policies: Implications for the EU-China economic partnership

Policy Dialogue

The EU-China strategic partnership 15 years on: What direction for the next 15 years?

with Zhang Ming, Head of Mission of China to the EU and Gunnar Wiegand, Managing Director for Asia and Pacific at the European External Action Service

KAS-EPC Roundtable

**Snap elections in Turkey
Erdogan reloaded or a step change?**

Roundtable

What to expect from Turkey in 2018

PUBLICATIONS

Commentary

Turkey votes: Snap elections – Turkey at yet another crossroads
by Amanda Paul

Commentary

Armenia's "Velvet Revolution": Time is Pashinyan's worst enemy
by Amanda Paul

Policy Brief

10 years after Bucharest: Why NATO should double-down on Georgian membership

by Ana Andguladze, Policy Researcher at the International Society for Fair Elections and Democracy, and Amanda Paul

EU and China

China is and will remain a pivotal actor in the shaping of the international global order and an important interlocutor for the EU when it comes to matters such as trade, development, cyber and climate. The EPC continued to assess in 2018 the evolution of the EU-China relationship in these areas through a number of events and expert roundtables, as well the long-term prospects for EU-China relations.



EU neighbourhood

EPC analysts continued to track developments in the EU's neighbourhood, most notably in Turkey and the South Caucasus.

In Armenia, widespread discontent with the administration of former president Serzh Sargsyan turned a relatively small protest in late March into a full-blown revolt against the governing Republican Party of Armenia, while in Turkey, President Recep Tayyip Erdoğan called snap presidential

and parliamentary elections to boost the support for his ruling Justice and Development Party and transform Turkish politics from a parliamentary system to a presidential governance model, which would give the president sweeping powers.

EPC analysts provided analysis and context to the events, as well as concrete recommendations on how the EU could best respond.

Ukraine

As a key country in the EU's neighbourhood, what happens in Ukraine matters. The Ukraine Forum provides a platform for debate and discussion about Ukraine and EU-Ukraine relations, and a unique space to understand foreign, security, economic and domestic policy developments in Ukraine.

Four years after Ukraine's 'Revolution of Dignity', the EPC hosted the Foreign Minister of Ukraine, Pavlo Klimkin, at a Policy Dialogue to assess some of the key challenges facing the country, including the ongoing conflict with Russia, the security and economic situation and the role of the international community in supporting Ukraine on its European journey. Also taking part were David McAllister,

Chairman of the European Parliament Foreign Affairs Committee, and Anders Fogh Rasmussen, former Secretary General of NATO.

Just a few weeks ahead of the 2018 Ukraine Reform Conference on 27 June in Copenhagen, EPC President Herman Van Rompuy hosted a high-level conference with the Danish Foreign Minister Anders Samuelsen, who spoke about the reform process underway in Ukraine, highlighting the positive achievements but also the loopholes that still needed to be closed. Ukraine's Deputy Prime Minister for European and Euro-Atlantic Integration, Ivanna Klympush-Tsintsadze, described the path to reform in Ukraine as an "uphill battle", adding that "we cannot afford to fail".

EVENTS

Ukraine Forum Policy Dialogue
Electricity sector reform in Ukraine: Combining the energy transition & European market integration with Maroš Šefčovič, Vice-President of the European Commission for the Energy Union

PUBLICATIONS

Commentary
The Sea of Azov should not become a Russian lake
by Amanda Paul

Commentary
Occupied Crimea: Europe's grey zone
by Amanda Paul

Commentary
Ukraine should double down on reform in 2018
by Amanda Paul



A more constructive dialogue on migration

European Migration and Diversity (EMD)

EVENTS

Head-to-head

Relocation and refugee quotas: Which way forward?

with Aleš Chmelař, State Secretary for European Affairs, Czech Republic, and Cecilia Wikström, MEP

Policy Dialogue

Boosting refugee integration into the labour market. How can the EU help employers?

Roundtable

Geopolitics of the EU's external border – Reconciling foreign policy and border management

Policy Dialogue

Migration in the Mediterranean: Struggling to find a European solution

Policy Dialogue

How to expand complementary pathways to Europe for refugees?

PUBLICATIONS

Policy Brief

10,000 border guards for Frontex: Why the EU risks conflated expectations

by Irina Angelescu, independent consultant and Florian Trauner, Research Professor, Institute for European Studies, VUB

Issue Paper

Competing priorities at the EU's external border

by Katharina Bamberg, Policy Analyst; Francesca Fabbri; and Frank Mc Namara, Policy Analyst

Discussion Paper

The EU Resettlement Framework: From a humanitarian pathway to a migration management tool?

by Katharina Bamberg

Discussion Paper

Dublin and Schengen: A tale of two cities

by Marie De Somer, Head of European Migration and Diversity programme

Commentary

The external processing of asylum seekers. Member states' migration talking shop

by Frank Mc Namara

Although the number of refugees and migrants arriving in Europe has dropped significantly since the peak of the so-called refugee crisis in 2015, migration continues to be at the top of the European political agenda. The EMD programme closely monitored policy trends through the European Programme for Integration and Migration (EPIM) publication series, provided implementable recommendations and enabled multi-stakeholder discussions whilst seeking to promote a constructive dialogue on migration.

Border management and foreign policy

For some time now, the debate on migration has focused on how the EU can better manage its external borders, and especially the role that foreign policy plays in that regard. That is why many of the activities of the EMD team in 2018 were dedicated to the geopolitics of the EU's external border. Several members of our EMD and EIW team travelled to critical zones at the external border, including reception centres on the Greek islands and talked to representatives of the Frontex border agency. They presented their in-depth analysis in a detailed Issue Paper, shedding light on the interplay between border management and foreign policy. EPC analysts also presented the paper at dissemination events in Brussels, Berlin and Helsinki.



Schengen under threat

Another thread in the debate on migration in Europe is the lack of solidarity between member states and their inability to reform the Dublin Regulation. According to Marie De Somer, this tension has spilled over into the Schengen area, putting strain on one of the the EU's oldest and most popular accomplishments. In a widely-read Discussion Paper, she frames the debate within its historical context, highlighting the original connections between the Dublin and Schengen systems. On that basis, she argues that, in the absence of political leadership, both systems are at risk of going down together.

MEDIA

Der Tagesspiegel – 22 May 2018
Katzenjammer in der EU

BBC World – 28 June 2018
Europe divided on migration ahead of leaders summit
 Live interview Marie De Somer

TIME – 12 September 2018
The E.U. Is Planning a 10,000-Strong Armed Force to Protect Its Borders. Here's What to Know

"It's true the Schengen area is under pressure," says Marie De Somer, a senior policy analyst on migration and diversity at the European Policy Centre, a Brussels think tank. "But it's more political pressure, rather than actual pressure from uncontrolled movements."

The Economist – 25 October 2018
Border checks are undermining Schengen

PUBLIC APPEARANCES

In November 2018, Katharina Bamberg gave a presentation to the Catalan Commission for Refugees during the seminar 'Right to Asylum in the European Union: What is happening?'. Based on her publication on the same topic, she focused in particular on the tension between conceptualising resettlement as a humanitarian pathway or a migration management tool in the context of the EU Resettlement Framework.



Externalising migration policy

In its quest to try and gain control over the sudden influx of millions of refugees in 2015, the EU has sought to externalise the reception, management and processing of asylum seekers. Vincent Cochetel, the United Nations' High Commissioner for Refugees Special Envoy for the Central Mediterranean, came to the EPC to discuss the dire situation of refugees and migrants in Libya, and the possibility of organising evacuations through Niger.

He painted a dismal picture of the detention centres in Libya, and urged the EU to reform its asylum policies and create more legal pathways for migrants and refugees to come to Europe.

The EU-Turkey Agreement

The EU-Turkey Statement was concluded with the aim of managing migration across the Aegean Sea and reducing the number of refugees arriving in EU. Whilst the Statement was effective in achieving the latter, it has been met with a series of strong human rights concerns.

Two years since its adoption, the EPC and Friedrich-Ebert-Stiftung organised a conference that took stock of how the agreement was implemented and discussed the lessons learned. A panel of experts, including representatives from the Turkish and EU institutions, politicians and NGO workers from Greek islands, talked about the political context that provided the impetus for the Statement and reviewed the concerns voiced by civil society organisations. They also assessed the Statement's future, including proposals to replicate its framework in the context of the EU's relations with other third countries.

Speakers: **Jean-Claude Juncker**, Loukas Tsoukalis, Marco Buti, **Herman Van Rompuy**, Marc Lemaître, Ian Acheson, Luc Van der Taelen, Selim Cherkaoui, Klaus Welle, **Didier Reynders**, Kristi Raik, Hannes Rumm, Kadri Tastan, Marianna Skylakaki, Yannis Koutsomitis, **Vytenis Andriukaitis**, Nicola Bedlington, Francesca Colombo, Maroš Šefčovič, Miguel Arias Cañete, Dominique Ristori, **Tony Blair**, Theresa Griffin, Patricia Benchenna, **Danuta Hübner**, Zhang Ming, Cecilia Wikström, Aleš Chmelař, Aharon Leshno-Yaar, Ana Brnabić, Brooke Flanagan, **Tomasz Chruszczow**, Jennifer Rankin, Richard Walton, Saad Amrani, Hugo-Maria Schally, **Gunter Pauli**, Gunnar Wiegand, Augustin Palokaj, René Van Sloten, Adam Price, Lorenzo Kluzer, Wajid Khan, **Jean Pisani-Ferry**, Birgit Loeser, Martin Selmayr, Gordon Sondland, Hugo Dixon, Anand Menon, **Faruk Kaymakci**, James Watson, Pawel Swieboda, Jamie Shea, **Jo Leinen**, Catherine De Bolle, Rory Domm, **Beatriz Ríos**, Stephen Boucher, Jo De Backer, Cecilia Bonefeld-Dahl, Lowri Evans, Rudy De Leeuw, David Sterling, Reinhard Bütikofer, Carwyn Jones, **Angelina Eichhorst**, Katharina Bryan, **Vincent Cochetel**, Julian King, Tanja Fajon, Michael Karnitschnig, **Catherine Woollard**, Renate Tenbusch, Paraskevi Michou, Edouard Rodier, Abdullah Ayaz, Manolis Vournous, Charlotte Alfred, Pavlo Klimkin, David McAllister, **Anders Fogh Rasmussen**, Benedikt Klauser, Günther H. Oettinger, Stephen Raes, Jeffrey Franks, **Alberto Alemanno**, Gabriele Giudice, Ola Elvestuen, James Ker-Lindsay.



CONNECTING europe

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Narrowing the gap between the Brussels elite and civil society on the ground

EVENTS

Policy Dialogue

**A lost generation? The impact
of youth unemployment on
social cohesion in Europe**

*Roundtable with the Expert
Council of German Foundations
on Integration and Migration*

**A new German government –
What impact on EU migration
policies?**

Roundtable

**Sharing responsibility for
refugees: What way forward?**

Roundtable in Berlin

**Seizing the Potential of the
Citizens' Consultations on
Europe**

Supported by Stiftung Mercator, Connecting Europe enables civil society, activists, citizens, think tanks and academia on the ground to actively engage in EU decision-making processes in Brussels through forward-looking activities on the future of Europe that can foster dialogue and exchange among policy-makers and the voices of the next generation, on issues such as youth unemployment, climate, migration and active citizenship.

There were many ways in which Connecting Europe brought fresh ideas and new perspectives to the debate in Brussels. It hosted a 'European Encounters' event, moderated by Henning Hoff, Executive Editor of the Berlin Policy Journal, on youth unemployment and the deployment of the youth guarantee scheme; In April, it hosted the first Network Meeting of StartNet at the EPC. For two days, 18 representatives from 12 pioneering projects in StartNet Europe's networks from across Europe came together to exchange experiences on young people's transition to work and on empowerment; and organised expert roundtables on European migration policy.

As part of EU Green Week, Connecting Europe put together an event in collaboration with CLEI – Local Governments for

Sustainability, on air quality in European cities. A representative of the City of Katowice exchanged views on the topic with the European Commission's Clean Air Unit and various EU stakeholders from the private sector. And together with the Ecologic Institute and the European Climate Foundation, Connecting Europe was responsible for several workshops on the future financing of Europe's climate and energy objectives in the next EU budget cycle.

A number of events and workshops were also held seeking to understand some of the key political trends emerging across Europe, especially the rise of populism and its root causes, the role of social media (including disinformation); how to deal with increasing illiberalism in member states such as Poland and Hungary; as well as the impact of Brexit.

Connecting Europe also took to the road, organising a workshop in Berlin with the different project partners of the network in order to raise awareness about the European elections in 2019. Themes explored included how to strengthen the participatory aspects of European politics, how to create a European narrative and how to avoid further polarisation of the debate.



“ It is more important than ever to bring the ideas, stories and interests of civil society to Brussels and to strengthen the link between the debates and decision-making processes in Brussels and the activities of civil society and activists at the local level. Building authentic relationships between diverse practitioners, policymakers and stakeholders can contribute to engaging in policy conversations that offer space for discussing both difficulties and potential ways forward.”

*Julia Hoffmann,
Programme
Coordinator,
Advocate
Europe*



1
network meeting

2
webinars

25
events

64
speakers

714
Twitter followers

1,200+
participants



FUTURELAB EUROPE

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EVENTS

Policy Dialogue

Let's shape the Europe we want! Engaging citizens ahead of the European Parliament elections in 2019

Exhibition

& Panel Discussion

Crossing Identities: Diversity and Inclusion in Europe

After seven fruitful years, the FutureLab Europe project came to an end in 2018. It did so in style. Another group of young Europeans joined the network, wishing to play an active part in shaping the future direction of Europe. Events were organised in Brussels where they interacted with EU decision-makers, including the project's Annual Forum and the FLE 2018 Autumn Conference.

In the context of the latter, the photo exhibition and panel debate 'Crossing Identities: Diversity and Inclusion in Europe' took place on 24 September 2018 at Atelier 29 in Brussels. It showcased the work of the project 'Crossed Paths of Europe', which aims to highlight similarities and differences between migrants and local residents across Europe by asking them to reflect about what Europe means to them and represent it through photography. Brussels was the third stop of the exhibition, after Stockholm and Edinburgh.

The panel discussion was a unique chance to learn more about the motives and ideas

behind the project from the project team members, Emma Thomson and Kawthar Karout. They were joined in the panel by Katharina Bamberg, Junior Policy Analyst from the Migration and Diversity Programme, and a representative of the Belgian association Plateforme citoyenne de soutien aux réfugiés.

FutureLab Europe also financed and supervised the implementation of five other citizenship projects (including the aforementioned 'Crossed Paths' project) conceptualised by FutureLab Europe members. They then carried out these projects in their local communities, and promoted the core topics of Futurelab Europe: democratic values, equal opportunities and European identity.

FutureLab Europe members Yulia Gershinkova (Hometelling), Emma Thomson (Crossed Paths of Europe), Anna Saraste (European Heroes), Tuure-Eerik Niemi (EU2YOU), and Benjamin Wilhelm (Civic Act) came to Brussels to present the results of their projects to high-level experts. They also discussed the state of European democracy and citizen participation in Europe with a view to the European Parliament elections in 2019.





CITIZENSHIP PROJECTS:

Crossed Paths, a project by Emma Thomson and Kawthar Karout, explored the concept of European identity by inviting refugees and long-term members of local communities to take photos of their personal experiences in Europe. The photos were curated and shown at public exhibitions in Stockholm and Edinburgh, and functioned as the basis of discussion for two workshops on European identity in secondary schools in both Stockholm and Edinburgh.

Hometelling – Testimonials from Europe explored the question of belonging and identity in Europe. The team, consisting of Marija Biljan, Yulia Gershinkova, Argyri Kaoukaki, and Miriam Mona Müller, interviewed people with a migration background residing in Europe, highlighting the diversity of living experiences on the continent and what makes people 'feel at home'. Each interview was paired with a picture and curated in a publication, which was presented at a launch event in Berlin.

Concerned about the pervasiveness of negative stereotypes about Central and Eastern Europe, the team behind **EU2YOU**, consisting of Tuure-Eerik Niemi, Samson Son, and Elisabetta Vitello, aimed to address these negative preconceptions by producing

informative, yet entertaining, YouTube videos. The project culminated in a video shot in Brussels, advancing the visibility of the work of young Eastern European decision-makers and activists.

European Heroes aimed to inspire young people to take action at the local, national and European levels by providing them with role models and hands-on advice on how to make their voices heard. Team participants David Timis, Alin-Gabriel Gramescu, and Anna Saraste interviewed young European activists who carried out various successful initiatives and produced videos and 'how-to' articles on the different ways to become civically engaged, such as how to start a petition or a movement. The project was shortlisted for the European Youth Award as one of the top five active citizenship initiatives in Europe.

Civic Act, comprising of team members Chrysi Chrysochou, Giovanni Moro, and Benjamin Wilhelm organised workshops on civic activism in secondary schools across Greece and Portugal. Using a learning-by-doing methodology, Civic Act aimed to educate and empower young people to solve local problems through active participation, promoting the importance of youth engagement in political and social life.

Instability and order in Eastern Europe: European and American approaches



Giovanni
GREVI





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Analysis



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Senior Adviser on the EU digital agenda



JACKI DAVIS

Senior Adviser on communications



LIEVE FRANSEN

Senior Adviser on health, social and migration policies



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JØRGEN KNUD HENNINGSEN

Senior Adviser on energy and the environment



HANS MARTENS

Chair of the Coalition for Health, Ethics and Society (CHES); Senior Adviser on public service reform



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YVES PASCOUAU

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*Director, European Policy Institute, Sofia;
Nonresident Senior Fellow, Atlantic Council*



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Athens University of Economics & Business
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GOVERNANCE

Governing Board



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The Governing Board is responsible for the management of the European Policy Centre. Day-to-day management is delegated to the Chief Executive, who acts as the EPC's Legal Representative and is accountable to the Board for the good functioning of the EPC.

The Board's main function, in practice, is to provide strategic oversight to the EPC as well as monitor and evaluate its operations. The Board meets four times a year.



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*Leading commentator and analyst on
European Union affairs*



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The Strategic Council brings together experts, thought leaders and politicians from diverse backgrounds and nationalities. They bring fresh insights and forward-looking perspectives on the major challenges facing the EU. Once a year, they meet to discuss strategic priorities and their implications for the work and strategic direction of the European Policy Centre.

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Foundations*

Zeger Vercooteren

*Vice-President Government Affairs & Policy
EMEA, Europe, Middle East and Africa,
Johnson & Johnson*

Achieving sustainability

Financing

The EPC's finances continue to improve. EPC ended the financial year 2018 with a surplus of €92,603, bringing the equity capital to €95,082.

Total income in 2018 was €2,788,421. The piechart shows the breakdown of funding sources.

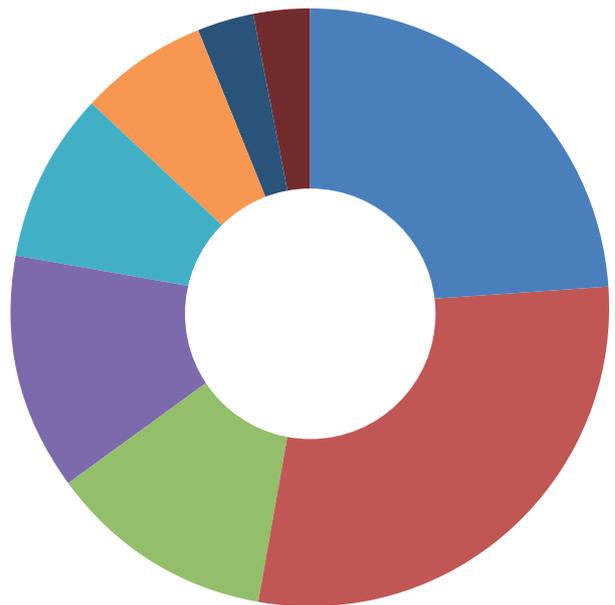
Approximately 47% of the EPC's funding in 2018 came from grants from the following sources:

- ▶ The King Baudouin Foundation, the EPC's strategic partner, awarded the EPC a grant of €350,000.
- ▶ The Stiftung Mercator awarded the EPC a grant of €370,000 for the Connecting Europe project
- ▶ The Europe for Citizens programme: the EPC received an operating grant of €250,000 for 2018 under the "Europe for Citizens" programme.
- ▶ The FutureLab Europe programme, which is supported by a consortium of European foundations.
- ▶ The EPC received €200,000 in 2018 from the Adessium Foundation to support two programmes: European Politics & Institutions and European Migration and Diversity.
- ▶ A donation of €50,000 was received from Cariplo for the years 2017 and 2018.

Another 24% of the EPC's funding came from membership fees, totaling €659,024.

Pro bono contributions

The EPC would like to thank Dechert LLP for its generous pro bono support and advice.



24%
MEMBERSHIP

13%
MERCATOR

3%
OTHER GRANTS

29%
PROGRAMME
SUPPORT

9%
EU GRANT

3%
FUTURELAB

12%
STRATEGIC
PARTNER KBF

7%
ADESSIUM

BALANCE SHEET			INCOME & EXPENDITURE STATEMENTS		
As on 31 December	2018	2017	As on 31 December	2018	2017
Fixed Assets			Income		
<i>Intangible Fixed Assets</i>	77.457	66.378			
<i>Tangible Fixed Assets</i>			Members' subscriptions	659.024	609.517
Net furniture & equipment	46.608	32.718	Grants and donations	1.213.678	1.178.735
Financial Fixed assets	848	848	Programmes & other	915.719	761.574
Total Fixed Assets	124.913	99.944	Total income	2.788.421	2.549.826
Current Assets			Expenditure		
Debtors	122.002	216.447	Office expenses	(774.912)	(661.192)
Banks	438.527	194.733	HR expenses	(1.920.906)	(1.832.366)
Accruals	213.926	249.3996	Total expenditure	(2.695.818)	(2.493.558)
Total Current Assets	774.455	660.579			
Current Liabilities					
Creditor Loans & accruals	181.744	213.466	Surplus / (deficit) for the year	92.603	56.268
Deferred income	607.281	544.578			
Total Current Liabilities	789.025	758.044	Surplus/(deficit) brought forward)	2.054	(54.214)
Net Current Liabilities	14.570	97.465	Net surplus/(deficit) carried forward	94.657	2.054
Long term Liabilities	15.261				
Net Assets (liabilities)	95.082	2.480			
Accumulated surplus/(deficit)	94.657	2.054			

Auditor: Saskia Luteijn, Partner, L&S Registered Auditors

Sustained support for independence

Acknowledgements



The King Baudouin Foundation is a Belgian public benefit foundation that seeks to change society for the better by investing in inspiring projects and individuals. One of its aims is to foster cohesion and build bridges within Europe. With that objective in mind, it established a strategic partnership with the European Policy Centre in 2002.

The partnership contributes to the European integration process by setting the stage for informed debates about EU policies with a wide range of stakeholders.

The foundation's sustained support allows the EPC to have a long-term perspective whilst maintaining its independence.



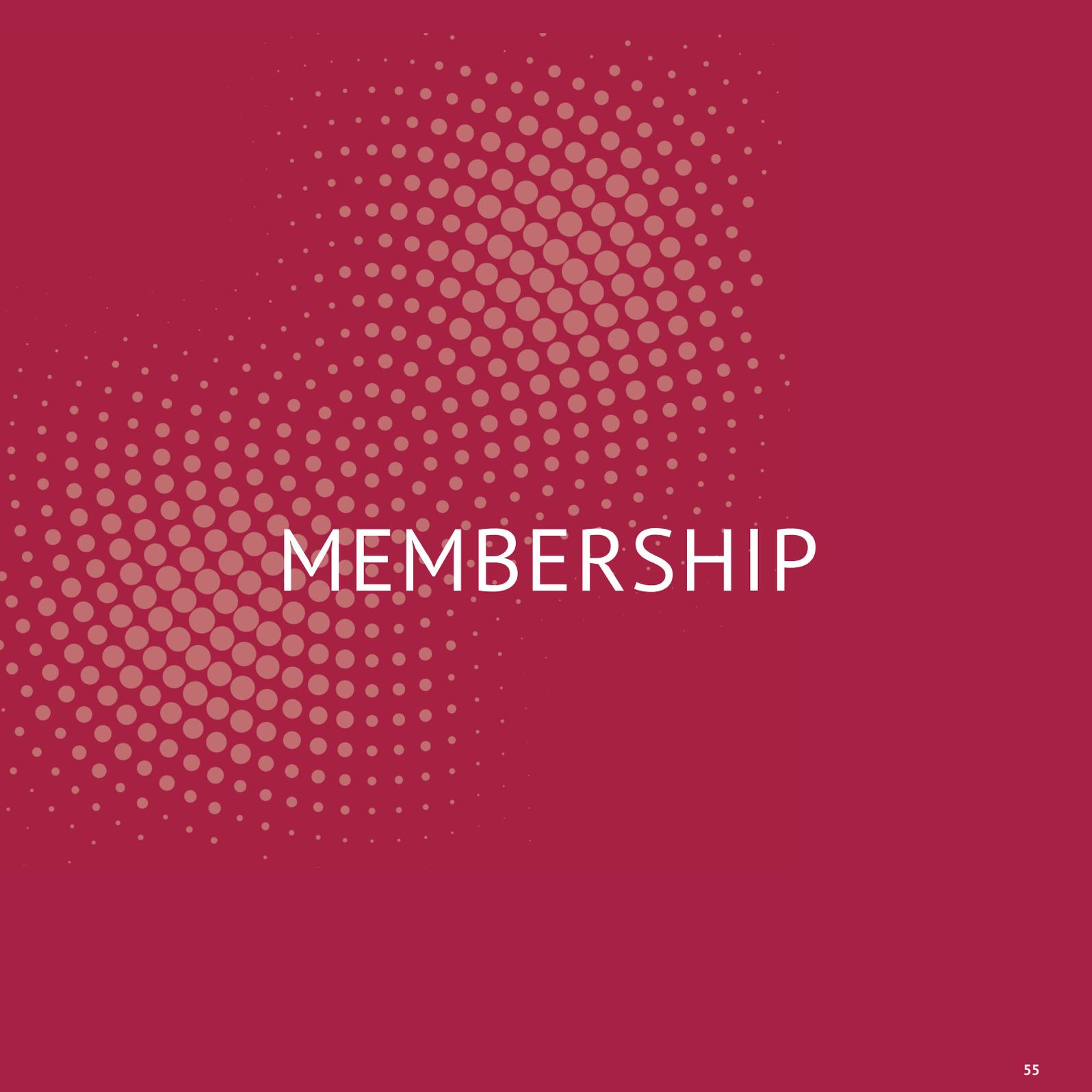
Europe for Citizens
Programme

The Europe for Citizens programme, funded by the EU budget, awarded the EPC an annual operating grant of €250,000 for the period 2018-2020, alongside other similar think tanks and civil society organisations.

understanding of the EU policymaking process and their involvement in the European public policy debate, as well as through its work on the future of Europe.

As a think tank engaged in European public policy research, the EPC contributed to the aims of the programme through its activities aimed at promoting citizens'

The EPC thanks the European Commission and the EACEA for its support.



MEMBERSHIP

PLATINUM - 3

BT
Equinor
Johnson & Johnson

CORPORATE - 59

ABB Europe
Amazon Europe Core Sarl
APCO Worldwide
Aurubis AG
Bain & Company
BASF SE
Burson Cohn & Wolfe (BCW)
Cambre Associates
Cargill
Celgene International II Sarl
Chevron Corporation
DELL
Deloitte
DLA Piper
Dow
Eamonn Bates Europe
EDF - European Affairs
EMBRAER, Empresa Brasileira de Aeronautica
ENEL
EPPA
EUK Consulting
EUTOP Brussels SPRL
ExxonMobil
Facebook
Ferrero
FIPRA
FleishmanHillard
FTI Consulting
GlaxoSmithKline

Google
GPLUS
Hyundai Motor Company
Iberdrola S.A.
IFOK GmbH
Ingka Group/IKEA
Kreab
Macro Advisory Partners LLP
Merck Sharp & Dohme
Miltton Brussels
Mitsubishi Corporation International (Europe) Plc
Mitsui & CO. BENELUX S.A./N.V.
Naftogaz of Ukraine
Naspers
Nord Stream 2 AG
Oracle Corporation
Philip Morris International
ROPAC - ROPA Consultancies GmbH
RTL Group
Salix Advisory SPRL
Schneider Electric
Siemens AG
Suez
Teneo
Teollisuuden Voima Oyj (TVO)
UL (Underwriters Laboratories)
UPS Europe SPRL/BVBA
Vodafone
Weber Shandwick
Zurich Insurance Company Ltd

PROFESSIONAL & BUSINESS ASSOCIATIONS - 76

Accountancy Europe
AGORIA
American Chamber of Commerce

to the European Union (AmCham EU)
Association of Chartered Certified Accountants (ACCA)
Association of German Chambers of Commerce and Industry (DIHK e.V.)
Bio-based Industries Consortium
BREKO (German Broadband Association)
Brussels European Employee Relations Group (BEERG)
Brussels Office of the Swedish Trade Unions
BusinessEurope
CECIMO
Cefic
CEN-CENELEC
CESI
CONCAWE
Confederation of British Industry (CBI)
Confederation of Danish Industry (DI)
Confederation of European Community Cigarette Manufacturers (CECCM)
Confederation of European Paper Industries
Confederation of Finnish Industries EK
Confederation of Netherlands Industry and Employers (VNO-NCW)
Confederation of Norwegian Enterprise (NHO)
Confederation of Swedish Enterprise
Cosmetics Europe – The Personal Care Association
Danish Agricultural Council

Delegation of Chambers of Commerce and Industry Paris/Ile de France
economiesuisse – Swiss Business Federation
EFPIA
EGBA
ETNO
EUROCHAMBRES
EUROGAS
EUROMETAUX
EUROMIL (European Organisation of Military Associations and Trade Unions)
EuropaBio
European Aluminium
European Association of Long-Term Investors (ELTI)
European Automobile Manufacturers Association (ACEA)
European Bioplastics
European Copper Institute
European Federation of Pharmaceutical Industries and Associations (EFPIA)
European Foundation for Management Development (EFMD)
European Major Exhibition Centres Association
European Organisation for Packaging and the Environment (EUROPEN)
European Round Table of Industrialists (ERT)
European Seed Association
European Trade Union Confederation (ETUC)
Federation of the German Waste, Water and Raw Materials Management Industry (BDE)
Fertilizers Europe

Finnish Energy	Ukrainian Industry Association "Federation of Employers of the Oil and Gas Industry"	Embassy of the Republic of Korea and Mission of the Republic of Korea to the EU	Mission of the People's Republic of China to the European Communities
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Gas Infrastructure Europe (GIE)	ZVEI - Zentralverband Elektrotechnik- und Elektronikindustrie	Embassy of the United States of America	Mission of the Republic of Moldova to the European Union
German Savings Banks and Giro Association (Deutscher Sparkassen und Giroverband) (DSGV)	Chemischen Industrie (VCI)	Embassy of Ukraine in the Kingdom of Belgium	Mission of the Republic of North Macedonia to the European Union
Ibec	World Employment Confederation-Europe	Embassy of Uruguay to Belgium and the European Communities	Mission of the Republic of Serbia to the EU
Industrial Minerals Association (IMA-Europe)	ZVEI - Zentralverband Elektrotechnik- und Elektronikindustrie	General Delegation of Quebec	Mission of Ukraine to the European Union
International Federation of Inspection Agencies	DIPLOMATIC - 63	Hong Kong Economic and Trade Office	New Zealand Embassy and Mission to the European Union
International Federation of Reproduction Rights Organisations (IFRRO)	Australian Embassy to Belgium and Luxembourg and Mission to the EU and NATO	Israeli Embassy in Belgium and Luxembourg	Permanent Delegation of Turkey to the European Union
Japan Center for International Finance (JCIF)	Brazilian Mission to the European Union	Macao Economic and Trade Office	Permanent Mission of the Russian Federation to the European Union
Japan External Trade Organization (JETRO Brussels)	Chilean Embassy to Belgium and Luxembourg-Mission to the EU	Mission of Andorra to the European Union	Permanent Representation of Austria to the EU
Joint Brussels Office of the UK Law Societies	Embassy and Mission of the Philippines to the European Union	Mission of Bosnia and Herzegovina to the EU	Permanent Representation of Croatia to the EU
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MedTech Europe	Embassy of Georgia to the Kingdom of Belgium	Mission of Georgia to the European Union	Permanent Representation of Estonia to the EU
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ORGALIME	Embassy of Kuwait in Brussels	Mission of Japan to the European Union	Permanent Representation of Greece to the European Union
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The Alliance for Beverage Cartons and the Environment (ACE)	Embassy of the Republic of Cyprus to Belgium	Mission of the Faroes to the European Union	Permanent Representation of Sweden to the EU
The Brewers of Europe		Mission of the Kingdom of Morocco to the European Communities	Permanent Representation of the FR of Germany to the EU
The Danish Association of Lawyers and Economists in Belgium (DJØF Belgium)			
The International Association of Oil & Gas Producers (IOGP)			
Turkish Industry & Business Association (TÜSIAD)			

Permanent Representation of the Netherlands to the EU
 Permanent Representation of the Republic of Cyprus to the European Union
 Permanent Representation of the Republic of Poland to the European Union
 Représentation Permanente de la France auprès de l'Union Européenne
 Royal Norwegian Embassy
 Royal Thai Embassy to Belgium and Luxembourg / Mission of Thailand to the EU
 Taipei Representative Office in the EU and Belgium
 U.S. Mission to the European Union
 UK Permanent Representation to the EU

FOUNDATIONS - 23

Alliance for Childhood European Network Group
 Bertelsmann Stiftung
 British Council EU Office
 Compagnia di San Paolo
 EGDMONT - The Royal Institute for International Relations
 European Climate Foundation
 European Cultural Foundation (ECF)
 European Foundation Centre (EFC)
 European Foundation for Democracy
 Fondazione Cariplo
 Friedrich-Ebert-Stiftung
 Friedrich Naumann Foundation for Freedom

Fundação Calouste Gulbenkian
 Fundación Academia Europea de Yuste
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 Hanns-Seidel-Stiftung
 King Baudouin Foundation
 Konrad-Adenauer-Stiftung
 Madariaga-College of Europe Centre
 Open Society European Policy Institute
 Software AG - Stiftung
 Stiftung Mercator
 Wilfried Martens Centre for European Studies

GOVERNMENTAL ORGANISATIONS - 4

Bundesagentur für Arbeit
 Kammerskollegium - National Board of Trade
 Representative Office of the Oesterreichische Nationalbank
 Umweltbundesamt Österreich / Environment Agency of Austria

INTERGOVERNMENTAL ORGANISATIONS - 13

Council of Europe
 EFTA Secretariat
 EFTA Surveillance Authority (ESA)
 European Bank for Reconstruction and Development
 European Investment Bank (EIB)
 International Centre for Migration Policy Development (ICMPD)
 International Monetary Fund (IMF)

International Organization for Migration
 NATO Parliamentary Assembly
 Regional Cooperation Council
 UNHCR - The UN Refugee Agency
 UNDP
 World Bank EU Office

NGO PLATFORMS - 1

Platform of European Social NGOs

NON-GOVERNMENTAL ORGANISATIONS - 42

Amnesty International
 ANEC, the European Consumer Voice in Standardisation
 Asylos
 Belgian Cystic Fibrosis Association (BCFA)
 Carbon Market Watch
 Caritas Catholica Vlaanderen
 Caritas Europa
 Central Europe Energy Partners
 Clean Europe Network
 Confrontations Europe
 Crisis Management Initiative (CMI)
 Danish Refugee Council (DRC)
 ELNET-EU
 Equality and Human Rights Commission
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 European Confederation of Junior Enterprises (JADE)

European Council on Refugees and Exiles (ECRE)
 European Public Health Association (EUPHA)
 European Stability Initiative
 European Youth Forum
 FOSTER EUROPE, Foundation for strong European Regions
 Goethe-Institut Brüssel
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 International Partnership for Human Rights (IPHR)
 International Rescue Committee
 Internet Society
 Network of European Foundations for Innovative Cooperation (NEF)
 NGO "Corporate Relations Research Center"
 NP "Industry Round Table for Cooperation with the European Union"
 NRC Europe
 ONE
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 Platform for International Cooperation on Undocumented Migrants (PICUM)
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 SAFE PASSAGE
 Society Against Violent Extremism - Belgium
 SOS Children's Villages International
 The German Marshall Fund of the United States
 Ukrainian World Congress (UWC)
 VoteWatch Europe
 WWF European Policy Office

REGIONAL BODIES AND LOCAL AUTHORITIES - 35

Central Denmark EU Office
Central Sweden European Office
City of Vienna - Liaison Office
Conférence des Régions Périphériques Maritimes d'Europe (CRPM)
EUROCITIES
Government of Catalonia – Representation to the EU
Hanse-Office
Helsinki EU Office
HM Government of Gibraltar - Representation to the European Union
Liaison Agency Flanders-Europe
Lombardy Region Government – EU Office
Mid Sweden European Office
NorthNorway European Office
North Sweden European Office
Office of the Northern Ireland Executive
Oslo Region European Office
Province of Limburg
Region Östergötland
Representation Office of Carinthia
Representation of Lower Saxony to the EU
Representation of the Free State of Bavaria to the European Union
Representation of the State of Baden-Württemberg to the European Union
Representation of the State of Bremen to the EU
Scotland Europa

Scottish Government EU office
Skåne European Office
Steiermark-Büro
Stockholm Region EU Office
Tampere Region EU Office
Turkish Cypriot Representation in Brussels
Turku-Southwest Finland European Office
Verbindungsbüro Land Niederösterreich
Welsh Government
West Finland European Office
West Norway Office

RELIGIOUS ORGANISATIONS - 7

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Commission of the Bishops' Conferences of the European Union (COMECE)
European Evangelical Alliance
European Union Office of The Church of Jesus Christ of Latter-day Saints
Evangelical Lutheran Church of Finland / Church Council
Islamic Community in Bosnia and Herzegovina
Protestant Church in Germany – Brussels Office

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Coventry University
The Faculty of International Legal Relations, National University 'Odessa Law Academy'

OTHER - 2

International Committee of the Red Cross
KfW

INDIVIDUAL - 6

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In strategic partnership with the King Baudouin Foundation



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