



EVENT REPORT

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State of Europe
The festival of politics and ideas

Europe matters: now or never



In partnership with



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About Friends of Europe

Friends of Europe is an independent think tank with a difference. 'Connect – Debate – Change' is central to the way we work. We have a unique toolbox at our disposal to connect stakeholders, foster debate and generate change.

CONNECT

Through our whole-of-society, whole-of-economy approach, we engage and connect critical thinkers, unusual voices and those who are ready to challenge the status quo. We believe that pioneering ideas and effective policies stem from breaking down of silos between policymakers, business leaders, civil society representatives and citizens.

We bring together stakeholders from across Europe and beyond and offer citizens an opportunity to take an active, transformational role in shaping their environment and in designing a renewed social contract fit for today's challenges and those on the horizon. We do not represent any national, religious or political point of view and ensure that all viewpoints are represented in our activities.

We build impactful networks. Our European Young Leaders (EYL40) programme connects Europe's most promising talents, while our Board of Trustees brings together the knowledge and experience of leaders, including presidents, prime ministers, European commissioners and presidents of the European Parliament.

DEBATE

We foster open, insightful and provocative debates to stimulate fresh ideas and creative thinking. Our portfolio of activities means that Friends of Europe contributes ideas and leads the debate on a wide range of EU-related issues, including:

Climate, Energy & Natural Resources | Peace, Security & Defence | Global Europe | Sustainable Livelihoods | Digital & Data Governance | Democracy

Through special projects, we create opportunities for joint advocacy and exchange of good practices among diverse actors. Our Ukraine Initiative aims to complement existing official efforts directed at enhancing short-, medium- and long-term support for Ukraine and offers a high-level, multi-stakeholder platform for advocating the strategic importance of supporting Ukraine and its Euro-Atlantic ambitions. Our Balkan Journey project seeks to circumvent stagnant debates on enlargement in order to focus on moving the region forward in practical terms through political imagination and forward-looking solutions. As a co-founder of the Africa-Europe Foundation we play our part to build bridges to foster global partnerships and help craft a new narrative for a modernised and prospect-oriented Africa-Europe relationship.

By engaging a growing community of citizens, our citizen data and engagement unit, Debating Europe, harnesses the collective intelligence of citizens across the EU to generate and help us road-test policy ideas, contributing to reimagining a democracy fit for the 21st century and nurturing a healthy public space.

CHANGE

We believe that real change is achieved through inclusive policies and actions. Through our wide programme of activities – from debates, summits and working groups, to publications and podcasts, citizen focus groups and surveys – we craft bold and innovative recommendations to revitalise the European Project and shape a renewed 21st-century social contract that is based on peace, prosperity, inclusion and sustainability.

By changing the dynamic between political institutions, business leaders, civil society representatives and citizens we aim to ensure that decision-making processes and policies across the EU are better informed by and can effectively respond to the needs of citizens, creating a more inclusive, sustainable, and forward-thinking Europe.

About the Jacques Delors Friends of Europe Foundation

Europe is in danger. It is faltering under the weight of seismic global shifts: geopolitical instability and trade wars, technological upheaval, demographic change and climate disruption. We are witnessing the erosion of European values and public trust, the rise of extremism, and a dangerous loss of global competitiveness.

Think tanks produce knowledge but lack societal impact or implementation power. Civil society has passion but often lacks influence. The private sector is disjointed across 27 regulatory frameworks.

Political extremes are mobilised, coordinated and generously funded, too often exploiting media and technology to poison public discourse with disinformation, and undermine press freedom, civic space, and democratic norms. In contrast, centrist, constructive, democratic actors are underfunded, fragmented, and vulnerable.

This is the moment to reclaim the narrative. Europe needs a **counterforce of equal ambition** to win back the hearts and minds of its citizens and businesses. There is a hunger for inspiration. An open door for reform.

This is what we aim to deliver: **the joining of forces between Friends of Europe and the Jacques Delors Institutes (Paris, Berlin, Brussels)**, on the occasion of the 100th anniversary of Jacques Delors' birth, offers a compelling, strategic and urgent response.

Building on our respective legacies and robust networks, we are creating a unique pan-European independent think-tank, advocacy **group and communications powerhouse that connects Europe's brightest minds, boldest leaders and most engaged citizens.** We fuse rigorous think tank excellence with deep civic and private sector engagement, accelerating Europe's response to the world's grand challenges.

As this year's edition of our annual President's Gala Dinner celebrates the launch of the Jacques Delors Friends of Europe Foundation, we are delighted to engage with you on our renewed mission. **This is not a moment for small steps. It is a moment for bold strides. Let's walk them together.**

WEBSITE

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Executive summary

The nexus between security, technology and economics formed the core of this year's State of Europe event. A year after the re-election of US President Donald Trump ushered in a period of global turmoil unprecedented in recent decades, Friends of Europe's flagship annual roundtable focused on how Europe can cope.

How best to support Ukraine and bolster Europe's defences in the face of evermore brazen Russian aggression; how to harness the potential of Europe's single market to boost growth and competitiveness; how Europe can make up lost ground in the race to develop Artificial Intelligence (AI) and other revolutionary new technologies; and how to keep the battle against climate change at the top of the political agenda, were among the key questions driving the day's debates.

Speakers included European commissioners and senior national government officials; leaders of unicorn start-ups and executives running long-established global brands; political veterans and new voices from Friends of Europe's European Young Leaders (EYL40) programme; a Pulitzer-prize winner from Ukraine and peace campaigners from across Israel and Palestine.

As Ukrainian forces continue to thwart Russia's ground offensive, the Kremlin is intensifying its missile and drone attacks on energy infrastructure and other civilian targets. Simultaneously, Moscow is stepping up hybrid warfare incursions against targets elsewhere in Europe – airspace violations, drone probes, sabotage, disinformation, cyber-attacks and electoral interference. A robust European response is crucial, even more so as Trump flipflops on US support.

NATO nations have committed to raising defence and security budgets to 5% of gross domestic product (GDP) by 2030. How they spend those billions is crucial. Will Europe be able to learn the lessons from Ukraine and invest in the right weapons systems? Can it muster unity on other key security issues: from filling aid gaps for Ukraine, to pushing forward with European Union enlargement and the deployment of AI in defence?

More broadly, speakers pondered how to prevent Europe from slipping further behind as the US and China surge forward with the AI revolution.

Can Europe's commitment to democratic values and regulatory norms that protect citizens become a force that encourages innovation, rather than holding it back? Representatives from the public and private sectors agreed that both sides need to collaborate more to promote the competitiveness and growth Europe needs to underpin security.

At a time when climate change is slipping down the political-priority list in many places, State of Europe highlighted an urgent need to mobilise public and political support for a renewed fight against global warming, while ensuring that the green transition brings clear economic and social benefits for citizens.

War and peace

Russia's war on Ukraine is approaching its fourth year. With its ground offensives making minimal progress at huge cost, Russia is intensifying air attacks on Ukraine's cities and civilian infrastructure. Scanting divisions in NATO, Moscow is increasingly testing the resolve of Ukraine's European supporters through hybrid aggression: violating allied airspace with planes and drones, sabotaging critical infrastructure, widening cyber-attacks and election interference.

The scenario is made more dangerous by the Trump administration's fuzzy positions, casting doubt on NATO's mutual defence commitment and cosying up to the Kremlin dictatorship.

Against that background, State of Europe speakers said Europe not only has to act fast to bolster defence and deterrence in the short term, but also to prepare for a lengthy period of confrontation.

"This is not a local, short-term war that can be ended. Russia is a permanent aggressor [...] it is important to think about military support in a more strategic way," cautioned **Taras Kachka**, Ukrainian Deputy Prime Minister for European and Euro-Atlantic Integration. "This is a tipping point, defence is back on the agenda in terms of threats to European Union and actual, total war against Ukraine. This is the most important thing and I think it will be on the agenda of Europe for many years."

Jamie Shea, Senior Fellow for Peace, Security and Defence at Friends of Europe, and former deputy assistant secretary general for Emerging Security Challenges at NATO, said the current situation is perhaps more dangerous and certainly more



Taras Kachka

complex than during the Cold War. He warned Europe could be forced into a wider war with Russia if it responds inadequately to current aggression.

"This is not a local, short-term war that can be ended. Russia is a permanent aggressor"

Taras Kachka, Ukrainian Deputy Prime Minister for European and Euro-Atlantic Integration

"Our success in winning the two wars that are actually going on – helping Ukraine and confronting attacks in the grey zone – will largely determine whether we get involved in a third, much larger confrontation with Russia," predicted Shea.



Jamie Shea

“Our success in winning the two wars that are actually going on [...] will largely determine whether we get involved in a third, much larger confrontation with Russia”

Jamie Shea, Senior Fellow for Peace, Security and Defence at Friends of Europe, and former deputy assistant secretary general for Emerging Security Challenges at NATO

Despite the string of hostile actions, many European leaders fail to recognise the gravity of the Russian threat, complained **Dalia Grybauskaitė**, former president of Lithuania and Trustee of Friends of Europe. “Putin is kicking our butt, every day, but still the urgency of the situation in Europe is not yet here,” she said.

Europe has no choice but to strengthen its own defences, amid doubts over US security guarantees under Art. 5 of NATO’s founding treaty. “We have pressure from both sides, from our enemy on the eastern border and our unpredictable partner, the US,” Grybauskaitė added. “Who can say today that Art. 5 is absolute or depends on the mood of one person in the morning, after the coffee or Coca-Cola.”

Faced with US reluctance to open up full NATO membership, Kachka said European decisions on providing Ukraine with security guarantees will be crucial in shaping future European security architecture.

Despite what one participant called a US ‘betrayal’ of its European allies, speakers said efforts should be made to preserve the relationship and seek to keep Washington on board. The importance of using alternative channels such as contacts with US states and cities, businesses, academia and civil society were highlighted as key to protecting transatlantic bonds as relations with the White House are strained.

“Two of the great assumptions of the US and Europe are in question [...] for 80 years it’s been free trade and security guarantees, and now it’s ‘maybe not’,” noted **Blake Lawit**, Chief Global Affairs and Legal Officer at LinkedIn. “What is important is for there to still be that strong tie between the United States and Europe.”

There was broad support for the decision by NATO leaders in June to devote 5% of GDP on defence- and security related budgets by 2030, but as doubts about the US engagement with Europe rise, Allies need to reflect on where the money is spent.



Dalia Grybauskaitė

“We have pressure from both sides, from our enemy on the eastern border and our unpredictable partner, the US”

Dalia Grybauskaitė, former president of Lithuania and Trustee of Friends of Europe

“It’s great to see, and I think we should have done it way before, European countries committing much more of their GDP to NATO. What we don’t want to see is all of this spending flowing back to US companies,” said **Arthur Mensch**, Co-Founder and CEO of Mistral AI.

“We need our defence systems to be fully independent from foreign providers, because we often do not have the same agenda as our allies and our partners. We need to invest in AI for defence and we are not doing it well”

Arthur Mensch, Co-Founder and CEO of Mistral AI

“There is an opportunity for that massive investment in defence [...] to promote dual-use technology especially in Artificial Intelligence, in Europe,” Mensch added. “We need our defence systems to be fully independent from foreign providers, because we often do not have the same agenda as our allies and our partners. We need to invest in AI for defence and we are not doing it well.”



Besides ensuring that beefed up defence budgets support European industry, participants cautioned against wasteful spending on expensive armaments rendered obsolete by the fast-paced development

of mass-produced drones and other cut-price weaponry on Ukraine’s battlefields.



“We need to be very careful looking at the reality of the war in Ukraine right now,” said **Vasilisa Stepanenko**, Ukrainian Pulitzer and Oscar Prize-winning journalist and European Young leader (EYL40), who briefed the conference on her frontline reporting. “This war is changing a lot, really soon it will be a robotic war, because with the amount of drones it is really crazy.”

Beyond the purely military aspects of defence, Europe needs to build up resilient societies, where citizens and institutions, both private and public, mobilise to defend democracy against internal and external threats.

“We need to be very careful looking at the reality of the war in Ukraine right now”

Vasilisa Stepanenko, Ukrainian Pulitzer and Oscar Prize-winning journalist and European Young leader (EYL40)

In the crucial domain of cyber-security, for example, organisations such as NATO, Europol and the European Central Bank need to partner with private-sector players to build resilience, noted **Kelly Devine**, President of Mastercard Europe.

“We are only as strong as we stand together,” she affirmed. That message is getting through. “It is working. This is one of those areas where the case for collaboration and the case for change is so high, that absolutely we see it work. That call for action is very, very compelling.”

Devine announced that Mastercard will open three new data centres on this side of the Atlantic, a decentralisation reflecting faith in Europe as an economic and tech power, as well as providing the US company with flexibility in the uncertain global context. “It gives us resiliency in the face of the unimaginable,” she said. “We are doubling down on resilience. It’s something we think about all day, every day.”

“We are doubling down on resilience. It’s something we think about all day, every day”

Kelly Devine, President of Mastercard Europe



Henna Virkkunen, Executive Vice-President of the European Commission for Technological Sovereignty, Security and Democracy, acknowledged hostile players seek to exploit Europe’s democratic and societal openness to probe for vulnerabilities. She insisted, however, that Europe can defend itself from hybrid actions, while maintaining its respect for democratic values and the rule of law.

To do so, she said Europe needs to forge self-reliance in key technologies, breaking its



dependence on global supply chains dominated by outside players who may not share its values and objectives.

“Dependencies can be used against us,” Virkkunen said. “We have to make sure that we are not dependent on any third country in any critical areas, and also that we are not dependent on any one company in any critical area.”

State of Europe featured a special roundtable discussion on the Israel-Palestine conflict with experts and peace advocates from the region; and held a series of briefings on Europe’s relations with China, India, Latin America, Africa and the US.

“We have to make sure that we are not dependent on any third country in any critical areas, and also that we are not dependent on any one company in any critical area.”

Henna Virkkunen, Executive Vice-President of the European Commission for Technological Sovereignty, Security and Democracy for a Europe fit for the Digital Age and Commissioner for Competition



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1. **Yael Patir**, Former Chief of Staff to Israel's Minister for Regional Cooperation, J Street Israel Director, and Israel Co-Director of the Palestinian Israeli Peace NGO Forum
2. **Isabelle Durant**, Former Deputy Secretary-General of the United Nations Conference on Trade and Development (UNCTAD), former Deputy Prime Minister of Belgium, President of Friends of Europe's Governing Board, and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation; **Jamie Shea**, Senior Fellow for Peace, Security and Defence, Friends of Europe, Former Deputy Assistant Secretary General for Emerging Security Challenges at the North Atlantic Treaty Organization (NATO)
3. **Gábor Iklódy**, Senior Fellow, Friends of Europe, Former Assistant Secretary General for Emerging Security Challenges at the North Atlantic Treaty Organization (NATO), Former EEAS Director for Crisis Management and Planning; **Štefan Füle**, Former Special Envoy to the OSCE and the Western Balkans, former European Commissioner, and Trustee of Friends of Europe
4. **Muhammad Shehada**, Visiting Fellow, Middle East and North Africa Programme, European Council on Foreign Relations (ECFR); **Haneen Abu Nahia**, Program Manager, Belgium Development Agency (Enabel)
5. **Zaha Hassan**, Senior Fellow, Middle East Program, Carnegie Endowment for International Peace, United States



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Bigger is better

Several speakers argued that expanding the EU to bring in Ukraine, Moldova and candidate nations from the Western Balkans is essential for underpinning security and stability across the continent.

“Ukraine’s membership in the European Union should not only be seen as part of the security guarantee for Ukraine, but also as a security guarantee for Europe,” stated Ukrainian former foreign minister **Dmytro Kuleba**.

“Without Ukraine in the European Union, we will not be able to speak about a prosperous and safe Europe for decades to come,” he said by video-link from Ukraine. “It is fundamentally important, to avoid wars in the future, to take Ukraine into the EU.”

Senior political leaders from candidate countries and existing EU members welcomed the renewed momentum behind the enlargement process since Russia’s full-scale invasion of Ukraine.

There is a danger, however, that foot-dragging on the EU side will spread disillusionment among citizens in the would-be members, fuelling anti-European sentiment, empowering hostile players and undermining stability.

“Enlargement is a two-way street. On our side we are very committed. We have shown very clearly that, not only are we resilient, but we can deliver, and we are united around that goal,” said **Cristina Gherasimov**, Moldavian Deputy Prime Minister for European Integration and Chief Negotiator with the EU. “It is very, very important indeed to see reciprocity on the other side.”

Gherasimov argued for the EU to set out a credible path to membership, with firm benchmarks and timelines.

“Enlargement is a two-way street. On our side we are very committed. We have shown very clearly that, not only are we resilient, but we can deliver, and we are united around that goal”

Cristina Gherasimov, Moldavian Deputy Prime Minister for European Integration and Chief Negotiator with the EU



Cristina Gherasimov

President **Jakov Milatović** of Montenegro said his country aims to become the 28th EU member in 2028. “Enlargement is an investment in stability and prosperity, not only for new members but for the stability of the European continent as a whole,” he said. “The accession to the EU of Montenegro is a story bigger than Montenegro. It would be a signal that new political processes pay off, reform pays off and that the enlargement process is very much alive.”

“Enlargement is an investment in stability and prosperity, not only for new members but for the stability of the European continent as a whole”

Jakov Milatović, President of Montenegro



Ukraine’s case underscores the risks of the EU turning its back on would-be members. Kuleba said Europe’s failure to offer Kyiv a membership perspective after it gained independence from the Soviet Union in the 1990s was a significant factor leading to Russia’s invasion.

“Ukrainians had to prove, with their blood and suffering and tears, to the rest of Europe that they belong to Europe,” he said. “Today, Ukraine is still inspired by the goal of joining Europe and leaving the Russian world once and for ever. It is one of the goals of this war and it will be one of the elements of the victory.”

Oana-Silvia Țoiu, Romanian Minister of Foreign Affairs and EYL40, said the EU and national governments have to develop a positive messaging campaign to ensure public support for membership in existing EU countries and the candidates.

“It is key that we go back to the citizens, having a better narrative, talking more about the advantages, security advantages, but also the economic advantages, the cultural advantages,” she said. “The European Union needs to be enlarged [...] We are stronger together.”

Notably, Țoiu said enlargement would be a shot in the arm for the European economy, expanding the EU’s internal market and boosting competitiveness. Those economic benefits could be crucial for success, as business gets behind the expansion project.

“It is the private sector that is going to drive the real integration of these regions – both in the Western Balkans and in eastern Europe – towards the European Union single market,” forecast **Valbona Zeneli**, Senior Fellow for Peace, Security and Defence at Friends of Europe, Senior Fellow at the Europe Center and Scowcroft Center for Strategy and Security at the Atlantic Council of the United States.

“The European Union needs to be enlarged [...] We are stronger together”

Oana-Silvia Țoiu, Romanian Minister of Foreign Affairs and EYL40





1. **Oana-Silvia Toiu**, Romanian Minister of Foreign Affairs, European Young Leader (EYL40); **Antoine Kassel**, Director for Labour Mobility and International Affairs, European Commission Directorate General for Employment, Social Affairs and Inclusion (EMPL)
2. **Dalia Grybauskaitė**, Former President of the Republic of Lithuania, and Trustee of Friends of Europe; **Megi Fino**, Deputy Minister, Ministry for Europe and Foreign Affairs, Albania, European Young Leader (EYL40)
3. **Janis Dombrava**, Member of the Latvian National Parliament Committee on National Security; **Andrea Rappagliosi**, Senior Vice President Public Affairs EMEACLA, Edwards Lifesciences; **Valbona Zeneli**, Senior Fellow, Friends of Europe
4. **Tokozile Xasa**, Ambassador, Mission of South Africa (2025 G20 Presidency) to the EU
5. **Jakov Milatović**, President of Montenegro; **Olivera Injac**, Ambassador of Montenegro to Belgium



The future is now

The interconnections between economics, technology and security are clear and wide-ranging. Without a competitive economy, Europe will be starved of the economic growth it needs to finance mounting defence needs. Unless it can break dependence on foreign-dominated supply chains, it will be vulnerable to hostile outside influences. Unless it can create an environment that encourages innovation and investment in new technologies, it will be sidelined by the AI revolution.

“We need to act very quickly if we don’t want to become an AI colony and don’t want to have our entire destiny dependent on other countries,” warned Mensch, whose Paris-based AI startup founded in 2023 is valued at over \$14bn.

His warning was echoed by **Yolanda Díaz Pérez**, Vice-President of the Government of Spain and Minister of Labour and Social Economy. “We need

to innovate or become irrelevant,” she cautioned. “We are currently living in a cold war when it comes to AI and the winners are going to rule the world [...] Europe faces a risk, in terms of tech dependence in face of the two giants in Asia and America.”

Smarter regulation is needed to keep Europe in the race, along with investment, cooperation between business, public administration and academia, and – where needed subsidies. Act right, and Europe may yet become a global leader in creating the regulatory framework for safe and effective AI development.

“Politicians are scratching their heads and thinking ‘how do we regulate this thing’, which has no borders,” noted **Dharmendra Kanani**, Chief Operating Officer and Chief Spokesperson of Friends of Europe. “It is operating at a level that none of us really understand [...] can you create



Yolanda Díaz Pérez

“We need to innovate or become irrelevant [...] Europe faces a risk, in terms of tech dependence in face of the two giants in Asia and America”

Yolanda Díaz Pérez, Second Vice-President of the Government of Spain and Minister of Labour and Social Economy

some sort of global regulatory framework for AI that will work for the future?”

European Commissioner for Startups, Research and Innovation **Ekaterina Zaharieva** and her team are trying. She recognised the need to move ‘really, really fast’ but said crafting the right regulation needs cooperation across borders and sectors. Europe also has to respect democratic norms, unlike some of its rivals.

“Maybe we are not doing enough, but I believe that we try to do the right things [...] keeping the democratic standards, of consultation, all the democratic standards that we are proud of,” she told the roundtable. “We should show, all of us, that being democratic and keeping democratic standards does not mean being slow and inefficient.”

“We should show, all of us, that being democratic and keeping democratic standards does not mean being slow and inefficient”

Ekaterina Zaharieva, European Commissioner for Startups, Research and Innovation



Ekaterina Zaharieva

Rather than holding Europe back, striking the right balance between tech progress and respect for values can give the EU a global leadership role. “In the end we need Europe, we need Europe to come out with the possibility that, by being inclusive, we can bring higher productivity and higher growth,” said **Gabriela Ramos**, Assistant Director-General for Social and Human Sciences at UNESCO. “It is very important that Europe reflects on how you can push an agenda that will work for people and will not be only driven by profit.”



Gabriela Ramos

Governments have to work to ensure people are not left behind in the rush to unleash the power of AI, said **Malcolm Byrne**, Chair of Ireland’s Parliamentary Committee on AI and EYL40. If not, they should expect a voter backlash.

“It is very important that Europe reflects on how you can push an agenda that will work for people and will not be only driven by profit.”

Gabriela Ramos, Assistant Director-General for Social and Human Sciences at UNESCO



Malcolm Byrne

“Our obligation has to be that we make safe AI,” he said. “What has to be at the centre of this discussion are citizens. This is a hugely disruptive technology. There are incredible opportunities, what we can see in healthcare is phenomenal, but it is going to lead to huge disruption and when we have disruption in the jobs market, that will have political repercussions.” Upskill and reskill plans must be put in place to help those whose jobs are impacted.

The role of AI in education is particularly sensitive. Innovation must be based on empathy, taking account of the real needs of teachers and students, said **Christina Pozzi**, Futures Scenarios Storyteller and Writer, Treccani Futura – Edulia, and EYL40.

“Our obligation has to be that we make safe AI”

Malcolm Byrne, Chair of Ireland’s Parliamentary Committee on AI and EYL40

“If we design without listening, we risk creating tools that burden rather than empower,” she noted. “We don’t learn to drive in a Ferrari, likewise we don’t need the most powerful AI technology in the world to transform education, we just need the right one, one that is age-appropriate, culturally appropriate, inclusive, meaningful and of course ethical.”

However, it isn’t easy to shape legislation that keeps kids from bad stuff in the digital world, acknowledged **Tjeerd de Boer**, Strategic Policy Advisor and Senior Developer at The Netherlands Institute for Sound and Vision. “It’s very important to get a better grip on harmful content, addictive algorithms and so on,” he said. “But we also have to take into account that, especially, kids are always very eager to find bypasses around regulation.”



1. **Ingrid Derveaux**, Secretary General, European Judicial Training Network; **Stephen Patterson**, Mayor, City of Athens, Ohio, United States
2. **Sandrine Dixon-Declève**, Honorary President, Club of Rome Brussels; **Stéphane Saurel**, Head of Division, Institutional and Regulatory Affairs Division, European Investment Bank (EIB)
3. **Yolanda Díaz Pérez**, Second Vice-President of Spain and Minister for Work and the Social Economy; **Joaquín Pérez Rey**, Spanish Secretary of State for Employment
4. **Jamila Aanzi**, Independent Government Advisor, The Netherlands, European Young Leader (EYL40); **Malcolm Byrne**, Teachta Dála, Chair of Ireland's Parliamentary Committee on Artificial Intelligence, European Young Leader (EYL40); **Samy Samandjeu**, Founder and President, NextAI Innovations; **Hajdana Kostic**, Artist and Painter, Hajdi Art, European Young Leader (EYL40)
5. **Cristina Pozzi**, Futures Scenarios Storyteller & Writer, Treccani Futura – Edulia, Italy, European Young Leader (EYL40)

Fixing fragmentation

“We strongly support a strong internal market that fosters a plurality of voices, supports and creates a fair and legal climate for business, allowing companies to invest with confidence.”

Madeleine de Cock Buning, Vice-President of Global Affairs EMEA at Netflix



Buffeted by Russian belligerence, Chinese muscle-flexing and a capricious US, Europe needs, more than ever, to get its act together in order to erase lingering barriers to seamless trade within the EU internal market and ensure regulation fosters competitiveness, productivity and innovation.

Business leaders from US companies operating in Europe lined up to make the case for

smart regulation within the single market. “Competitiveness is key for the future of Europe,” said **Madeleine de Cock Buning**, Vice-President of Global Affairs EMEA at Netflix. “We strongly support a strong internal market that fosters a plurality of voices, supports and creates a fair and legal climate for business, allowing companies to invest with confidence.”

Elaine Bowers Coventry, President of Europe (East) Operations at Coca-Cola, cautioned that poor regulation was holding back business and leaving Europe at a disadvantage on the international stage.

“The most important thing is to create the conditions for what you want to see”

Elaine Bowers Coventry, President of Europe (East) Operations at Coca-Cola



“The regulatory fragmentation in the EU is a real pain for investors,” she mentioned. “The most important thing is to create the conditions for what you want to see [...] regulations that are stable, that are easy to understand, approvals that move with speed so that things can be done in a proper timeline, especially as it compares with other regions in the world.”

A framework that promotes greater public-private cooperation is needed to ensure Europe is well-placed to confront the array of current challenges, contended **Andrea Rappagliosi**, Senior Vice-President of Public Affairs for EMEA, Canada and LATAM at Edwards Lifesciences. “We would like to inject a sense of urgency, he said. “We are not able to join forces [...] I’m a strong supporter of public-private partnership because no partner, public or private can do it alone. We need vision, we need leadership, that’s fundamental. And then we need a predictable plan.”



Andrea Rappagliosi

“I’m a strong supporter of public-private partnership because no partner, public or private can do it alone”

Andrea Rappagliosi, Senior Vice-President of Public Affairs for EMEA, Canada and LATAM at Edwards Lifesciences

The EU must identify priority sectors to bolster economic growth, whether in the creative economy, green tech or AI. It also needs to fix

market fragmentation and overcome an aversion to megamergers.



Sylvain Johansson

“A handful of standout firms drive a lot of productivity growth in many countries. We don’t want to be just a continent of small-and-medium-sized industries. It’s good to have a large common market, it’s good to have big firms. Let’s promote them,” maintained **Sylvain Johansson**, Director of McKinsey Global Institute and Senior Partner of McKinsey and Company.

“We don’t want to be just a continent of small-and-medium-sized industries. It’s good to have a large common market, it’s good to have big firms. Let’s promote them”

Sylvain Johansson, Director of McKinsey Global Institute and Senior Partner of McKinsey and Company

Former Italian prime minister **Enrico Letta** had a straightforward solution for making progress: reform legislative processes to move away from directives which give member states leeway in applying EU laws, in favour of directly applicable EU regulations.

“It is not difficult to apply. It is fundamentally a game changer because it is the way to avoid fragmentation,” contended Letta, author of the 2024 report on the future of the Single Market, and currently President of the Jacques Delors Institute and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation.

“Fragmentation is because of the bad application, implementation, by each member state, of the directives,” he added. “This is very simple. I know it is not very attractive, it’s not a moon shot, but it is a real game changer. Stop directives.”

“Fragmentation is because of the bad application, implementation, by each member state, of the directives”

Enrico Letta, President of the Jacques Delors Institute, Author of the Letta report on the Future of the Single Market, and former Prime Minister of Italy, and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation





1. Sylvain Johansson, Founder, Hope-based Communications; **Urška Lipovž**, Head of the Cabinet, Ministry of Labour, Family, Social Affairs and Equal Opportunities, Slovenia; **Luka Mesec**, Slovenian Deputy Prime Minister and Minister of Labour, Family, Social Affairs and Equal Opportunities, European Young Leader (EYL40)

2. Aslak Holmberg, Saami activist, Member of the Saami Council, European Young Leader (EYL40); **Elaine Bowers Coventry**, President of Europe (East) Operations, The Coca-Cola Company; **Joaquín Almunia**, Visiting Professor at LSE and Sciences Po Paris, and former Vice-President of the European Commission, and Trustee of Friends of Europe

3. Mats Löfström, Vice-Chair, National Parliament, Finland, Transport and Communications Committee, Finland

4. Marian Angeles Elorza Zubiria, Director General, eAtlantic Fundazioa Foundation, Spain; **Iñigo Urkullu Renteria**, President, eAtlantic Fundazioa Foundation, Spain, lehendakari, Former President of the Basque Country



From the heart

Communication is key to constructing a strong, prosperous, democratic Europe. Renewed narratives are needed to counter the easy pseudo-solutions trumpeted by euro-sceptic popularists and pro-Kremlin propagandists. Defenders of Europe need to appeal to citizens' hearts as well as their heads.

"You have to start mobilising; you have to start engaging," stated **Pascal Lamy**, Coordinator of the Jacques Delors Think tanks, former director general of the World Trade Organisation, former European commissioner, Trustee of Friends of Europe and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation. "We have to get out of the cold of rationality, which is comfortable in many ways, to the heat of emotion, which is more controversial, which sometimes obliges you to get out of your zone of comfort."

"We have to get out of the cold of rationality, which is comfortable in many ways, to the heat of emotion, which is more controversial"

Pascal Lamy, Coordinator of the Jacques Delors Think tanks, former director general of the World Trade Organisation, former European commissioner, Trustee of Friends of Europe and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation

State of Europe 2025 marked the official launch of the new Jacques Delors Friends of Europe

Foundation, the first truly independent pan-European think-tank network, communications powerhouse and citizen engagement platform. It aims to confront global turmoil with a broad investment in innovative thinking to produce urgent and strategic responses to the challenges facing Europe.

On the centenary of Delors' birth, speakers noted how Europe has changed since the 1980s and 1990s, when the French former finance minister headed the European Commission. Back then, Europe enjoyed a period of optimism characterised by the collapse of the Soviet bloc and advance of European integration through the formation of the single market, free movement of citizens within the EU and the Maastricht Treaty laying the foundations of the euro common currency.



Pascal Lamy

Today, the Brussels euro-bubble needs a ‘reality check’ to forge forward-looking narratives that can again inspire young people with the ideal of Europe, argued **Alessandra Cardaci**, Head of Programming and Operations at Debating Europe.

“The kind of Europe he (Delors) lived in is completely different from the Europe we live in today,” she said. “We need to keep the memory alive, but at the same time, when we think about young people, [...] how can we sell them a new narrative that is appealing and also forward-looking to avoid this, sometimes anachronistic, nostalgia of looking at the past?”

That theme was picked up by **Thomas Coombes**, Founder of Hope-based communications, who said Europe needs positive, future-based messaging to inspire younger generations to distant from the original ideal of European unity as a peace project after the horrors of two world wars.

“It’s is not enough to tell people what we are avoiding from the past. We have to offer a direction to move forward [...] we need momentum,” he said. “What you can’t do is be boring; we have to inspire people; we have to put a picture in their minds.”

Rather than focusing on negative images, such as fear of authoritarian populist politicians, pro-European democrats should instead build communication around the benefits of solidarity, empathy, community and democracy, Coombes said. “Rather than talk about something you’re against, talk about what you actually want.”

Turning down the heat

Communication is especially important on climate change at a time when the global warming emergency has been pushed down the political agenda by the accumulation of crises and rise of sceptical politicians. In response, Europe needs to reach out to doubters, with education, highlight the benefits of energy transition, and equate sustainability with increased prosperity and higher living standards.

Many people simply do not understand why they should take action to protect the climate that will not bring them visible benefits in the short-term, acknowledged **Andréa Ganovelli**, Co-Founder and CEO of Green-Got, a fintech dedicated to green investments, and EYL40.

“Climate is an issue that is far away for most people in Europe,” he said “We should find a way to link personal benefits to greater-good benefits. This is the only way to try to save climate and keep talking about climate in Europe. By doing that we can get the public to act.”

“We should find a way to link personal benefits to greater-good benefits. This is the only way to try to save climate and keep talking about climate in Europe”

Andréa Ganovelli, Co-Founder and CEO of Green-Go

Lubomilla Jordanova, Founder and CEO of Plan A and another EYL40, agreed. She saw how populists have managed to play on fears of economic and social change to undermine pro-climate messages. “There is a big chunk of society sitting out there that does not resonate with these messages, they are fed a language which is of short-termism, that is of fear and anger,” Jordanova said.

Despite that, polling by Debating Europe shows 59% of young Europeans think climate action should be the EU’s top budget priority over the coming years, ahead of health and education.



Andréa Ganovelli

To win over more people, messaging must focus on the concrete benefits of climate action – improving health, cutting energy bills, boosting economic growth and prosperity through green investment and reducing dependence on imported fossil fuels.



María Fernanda Espinosa

“If we give up on the ‘C-word’, we are giving up on development, we are giving up on competitiveness, we are giving up on industrialisation, we are giving up on energy, we are giving up on the strategic autonomy about which Europe speaks so often”

María Fernanda Espinosa, Executive Director of GWL Voices and former president of the UN General Assembly

“When you say ‘climate’ people say, ‘yes, yes, I’ll call you, don’t you call me’ because we have so many other things to worry about in the world right now,” complained **María Fernanda Espinosa**, Executive Director of GWL Voices and former president of the UN General Assembly.

‘Climate’ has almost become an unmentionable concept in political circles, yet the public needs to understand that climate action is interconnected to other factors bringing short-term benefits. “If we give up on the ‘C-word’, we are giving up on development, we are giving up on competitiveness, we are giving up on industrialisation, we are giving

up on energy, we are giving up on the strategic autonomy about which Europe speaks so often,” Espinosa warned.

The link between climate and security was highlighted by **Connie Hedegaard**, Chair of the OECD's Round Table for Sustainable Development; former European commissioner for climate action; former Danish minister for the environment and for climate and energy; and Trustee of Friends of Europe.

“Climate is on the back burner [...] but climate change unfortunately did not take a break because we became busy handling other challenges,” she said. “Energy and climate are very much related also to security. We need to become resilient [...] We have transferred more money to Putin’s Russia for imported fossil fuel than we have paid to Ukraine.”



Connie Hedegaard

“Energy and climate are very much related also to security”

Connie Hedegaard, Chair of the OECD's Round Table for Sustainable Development; former European commissioner for climate action; former Danish minister for the environment and for climate and energy; and Trustee of Friends of Europe

“Energy and climate are very much related also to security”

Connie Hedegaard

Even when political leaders make commitments on climate action, they too often fail to follow up with effective implementation, noted **Paul Watkinson**, Paris Agreement Climate Negotiator. “We need everybody to deliver on what they have promised to do,” he said. “We really need to move towards solid follow up, knowing what is working and what isn’t.

That’s the challenge [...] it’s not just announcements, it’s delivery and implementation.”

Recognising the difficulties in getting public opinion on board, Spanish Vice-President Díaz Pérez said a new Social Contract is required to underpin the digital and green transition.

“What is at stake is the democratic project, it is democracy in the world,” she said. “Europe has to be inclusive in the broad sense [...] If we do not have this Social Contract with the working men and women included, with companies included, there will be no just change on climate and we will not have a strong political project in Europe.”



Paul Watkinson

“We need everybody to deliver on what they have promised to do”

Paul Watkinson, Paris Agreement Climate Negotiator

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1. **Lubomila Jordanova**, Chief Executive Officer and Managing Director, Plan A, Germany, European Young Leader (EYL40)
2. **Julia Symon**, Head of Research and Advocacy, Finance Watch
3. **Thomas Coombes**, Founder, Hope-based Communications



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A now or never moment

State of Europe 2025 produced a series of concrete policy ideas to tackle challenges facing the continent. Among the most salient:

- Create a European intelligence agency;
- Make sure the EU membership process is merit-based, and brings each candidate in when they are ready, rather than waiting for a 'big bang' enlargement;
- Use security guarantees for Ukraine as the anchor of a new European defence architecture;
- Develop a more pro-active European hybrid defence capacity to better respond to cyber-attacks, sabotage, disinformation etc.;
- Craft a new climate narrative that focuses on tangible benefits for citizens, including lower energy bills, better health, economic growth and green jobs;
- Ensure increased defence spending goes towards cost-effective systems whose worth has been proven in Ukraine; invest in European solutions;
- A Renewed Social Contract to underpin Europe's digital and green transitions;
- Form a transatlantic movement to preserve ties between Europe and the United States at regional, city and civil-society level;
- Move away from European directives to regulations directly applicable in EU member states;
- Recognise the race to develop AI as vital for Europe's economic future and political sovereignty and create the right regulatory and investment conditions for European talent to thrive without moving abroad.

In conclusion, the high-level roundtable sent a clear message on the need for Europe to stand firm with Ukraine and move fast to step up its own defence capabilities, both to defend against Russia's ongoing hybrid aggression and deter the risk of a wider conflict. Washington's unreliable position under Trump has reenforced that imperative.

The rise in defence costs and the economic uncertainty engendered by Trump's policies underscores the importance of Europe creating conditions needed for more competitiveness and innovation. That means completing the EU internal market, streamlining regulation to boost domestic companies, encouraging public-private cooperation and nurturing a positive investment environment. Europe must harness the potential of AI or risk economic and geopolitical dependency.

Climate change cannot be left on the back burner. Politicians must wake up to the linkage between climate and security and step-up communications to bring the public back on board by stressing the benefits of climate action in bringing down living costs, promoting growth and creating jobs. A Renewed Social Contract is essential to ensure Europe's digital and green transitions are just and inclusive.

President's Gala Dinner



On the eve of the State of Europe high-level roundtable, Friends of Europe gathered hundreds of distinguished guests from all of Europe at the President's Gala Dinner, an evening dedicated to European unity and vision in challenging times. The event marked a unique milestone: the launch of the **Jacques Delors Friends of Europe Foundation**, born from the joining of forces of the Jacques Delors Institutes in Paris, Brussels and Berlin, and Friends of Europe.

Members of the Governing Board of the new Foundation – **Ilham Kadri**, CEO of Syensqo and Enrico Letta, President of the Jacques Delors Institute and former prime minister of Italy,

joined **Pascal Lamy**, Coordinator of the Jacques Delors Think tanks and Vice-President of the Jacques Delors Friends of Europe Foundation, and **Geert Cami**, Co-Founder of Friends of Europe and Secretary-General of the Jacques Delors Friends of Europe Foundation – were joined by other leading voices including **Oana-Silvia Țoiu**, Minister of Foreign Affairs of Romania and European Young Leader (EYL40), and journalist **Caroline de Gruyter**, to reflect on Europe's key challenges, and to chart an ambitious course based on Europe's existential crisis.



1. **Caroline de Gruyter**, European affairs Correspondent, NRC Handelsblad
2. **Jean Francois van Boxmeer**, Chairman, Vodafone Group; **Christian Danielsson**, State Secretary to the Minister for EU Affairs, Sweden
3. **Geert Cami**, Co-Founder and Secretary General of the Jacques Delors Friends of Europe Foundation, Co-Secretary General of Africa-Europe Foundation and Co-Founder & Secretary General of Friends of Europe
4. **Ilham Kadri**, CEO of Syensqo and Trustee of Friends of Europe, Member of the Governing Board of the Jacques Delors Friends of Europe Foundation
5. **Holy Ranaivozanany**, Deputy Executive Director, Africa-Europe Foundation (AEF); **Paul Walton**, Executive Director, Africa-Europe Foundation (AEF)





Enrico Letta, President of the Jacques Delors Institute, Author of the Letta report on the Future of the Single Market, and former Prime Minister of Italy, and Member of the Governing Board of the Jacques Delors Friends of Europe Foundation

Enrico Letta, building on his 2024 “Much more than a market” report, issued a clear call to action focused on the urgent completion of the European Single Market by 2028, a crucial deadline, he explained, that can unify efforts and drive profound transformation across the continent. Drawing on the legacy of Jacques Delors, Letta stressed that clear, shared timelines and ambitious objectives are essential for mobilising stakeholders, citizens and governments behind bold reforms. He linked this kind of collective mobilisation to historic achievements, from the moon landing to the removal of Europe’s internal borders, using the analogy to illustrate that major breakthroughs require a clear vision, common purpose and a concrete deadline.

Letta called for the creation of a coalition to push both national leaders and European institutions toward achieving the Single Market vision. He underscored the need to prioritise energy, connectivity and financial markets, while ensuring research, innovation and simplification are at the heart of the EU’s next chapter. Central to this effort, he urged, is direct communication with citizens: making clear the costs of an incomplete market and the shared benefits that a fully realised Single Market would bring to all Europeans.

Summing up his message, Letta stated: “Without a deadline, we will continue with the nitty-gritty; with a date, we can mobilise all of Europe to jump the obstacle and enter a new stage together.”



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1. **Pascal Lamy**, Coordinator of the Jacques Delors Think tanks, former Director General of the World Trade Organisation, former European Commissioner, Trustee of Friends of Europe and Vice-President of the Jacques Delors Friends of Europe Foundation
2. **Nicolae Ștefănuță**, Vice-President of the European Parliament; **Oana-Silvia Toiu**, Romanian Minister of Foreign Affairs, European Young Leader (EYL40)
3. **Matti Maasikas**, Managing Director for Europe and Central Asia, European External Action Service (EEAS) Eastern Europe and Central Asia (EURCA), former Deputy Minister for European Affairs of Estonia
4. **Taras Kachka**, Deputy Prime Minister for European and Euro-Atlantic Integration of Ukraine, Ukraine; **Cristina Gherasimov**, Deputy Prime Minister for European Integration of Moldova; **Daniela Morari**, Ambassador and Head of Mission, Mission of Moldova to the EU
5. **Ivan Lesay**, Senior Advisor for Climate Finance, National Bank of Slovakia, European Young Leader (EYL40); **Jakub Skrzywanek**, Curator and Artistic Director, The National Story Theatre in Kraków, Poland, European Young Leader (EYL40); **Hajdana Kostic**, Artist and Painter, Hajdi Art, European Young Leader (EYL40); **Nathalie Furrer**, Director, Friends of Europe; **Kosta Karakashyan**, Director / Producer, Studio Karakashyan, European Young Leader (EYL40); **Jan-Willem van Putten**, Co-Founder of the School of Moral Ambition and Training for Good, European Young Leader (EYL40); **Nevenka Lastrić-Đurić**, Croatian State Secretary for Internal Affairs, Ministry of the Interior, European Young Leader (EYL40)



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