



#EUROPE MATTERS

STATE OF EUROPE 2018

10-11 OCTOBER 2018 — HIGH-LEVEL ROUNDTABLE FOR FRIENDS OF EUROPE TRUSTEES,
EUROPEAN YOUNG LEADERS AND OTHER VIPS — 15TH EDITION, BRUSSELS

 friends
of europe

In partnership with



Edwards

McKinsey&Company

MCKINSEY GLOBAL INSTITUTE



#EUROPEMATTERS

#EuropeMatters is a 12 month project bringing together business leaders, policymakers, civil society representatives and citizens to co-design a Europe that still matters in 2030. This exercise takes place at a crucial moment. 2019 will see the election of a new European Parliament and the arrival of a new college of Commissioners. #EuropeMatters will put forward a set of concrete recommendations for the incoming EU leadership.

We will set out different scenarios for Europe in 2030, based on policy choices that Europe faces today. The scenarios rely on input from a vast network of experts and key influencers from diverse fields. Citizens are consulted through our Debating Europe citizens' platform with over 3.5 million unique users and a dedicated survey, the results of which will be disclosed at the State of Europe high-level roundtable on October 11. Hard data and figures are provided by the McKinsey Global Institute.

This combined set of data, expertise and statistics is used to set up scenarios designed to spark a discussion on Europe's future. The scenarios will focus on a set of key issues: aging population; disruptive technologies, notably digitization and AI; the rise of emerging markets and their impact on the competitiveness of EU businesses; migration and urban concentration; resource depletion and climate change; and the return of geopolitics – trade wars and tax competition.

The scenarios will guide our discussions at the State of Europe roundtable where we will co-produce policy recommendations for the incoming European leadership. We will launch a report containing our recommendations in January 2019 and engage with Europe's key political actors throughout the run up to the European Parliament elections, as well as with the new College of Commissioners.

Our objective is simple – to mobilise a coalition of the willing united by their belief that #EuropeMatters and to together ensure that Europe is better prepared to take strategic action to align the future we face with the future we want.

PROGRAMME

DAY 1 - PRESIDENT'S GALA DINNER

WEDNESDAY, 10 OCTOBER

The State of Europe is preceded on 10 October by the annual President's Gala Dinner co-hosted by Count Etienne Davignon, Belgian Minister of State and former European Commission Vice-President, and the Austrian Presidency of the EU Council. It brings together high-level guests from the worlds of politics, industry and civil society for an intellectually-stimulating and entertaining evening.



DAY 2 - STATE OF EUROPE

THURSDAY, 11 OCTOBER

This year, the State of Europe will serve as a key milestone in the development of our #EuropeMatters project. At the State of Europe, our scenarios and the views and insights we have gathered from citizens and stakeholders will be debated by sitting and former (prime) ministers, CEOs, NGO leaders, European Commissioners and senior EU officials, members of parliaments, influencers and top journalists. Participants will all be invited to break out of their comfort zones and work together to devise recommendations on how to achieve the Europe we want for 2030.



STATE OF EUROPE

11
October 2018

08.00 - 09.30 Welcome coffee and registration of participants

08.30 - 09.20

EARLY-BIRD MASTERCLASSES

UNDERSTANDING THE KEY ISSUES

This set of six parallel early-bird masterclasses, led by senior experts in their respective fields, focus on topics relevant to the brainstorm which takes place later in the day. The masterclasses are designed to provide insights on and explore new areas which may not be familiar to all participants, thereby helping participants to engage with each other on all the key issues discussed during the rest of the day. The topics selected are reflected in our scenarios for Europe 2030 and include key areas where the policy choices we make today will determine the fate and future of Europe.

Table 1 - Social Models for Tomorrow's Europe

Envid around the world as progressive and socially just, the welfare policies of EU countries will have to increasingly contend with ageing and demographic change. Change must also address Europe's widening inequalities and social imbalances. But by mid-century the current average of four active workers per pensioner could be reduced to two, so how adaptable should European social models be?

Table 2 - Industrial Policies for the Digital Era

When will European companies catch up with American online giants like Google, Amazon and Facebook, or China's Ali-Baba? Twentieth century Europe matched the US in its creation of multinational corporations, but has fallen behind in the Digital Era. What are the industrial policy solutions, both at EU and national levels?

Table 3 - The Impact of AI on Europe's Workforce

In the welter of confused and contradictory forecasts of the threats and promises of Artificial Intelligence, one thing is clear: Education and training hold the key. How should skills training be re-modelled so that it can keep pace with rapid and unpredictable technological change?

Table 4 - Policy Pushes to decarbonize and close the Carbon Gap

The political breakthrough achieved by the Cop-21 Paris agreement has suffered recent blows, and is focusing global attention on whether its goals can be achieved. What should the EU, as the pioneer on the clean energy transition, be doing to relaunch the global drive to combat climate change?

Table 5 - Europe's Widening Security Neighbourhood

Shifts in some of Europe's strongest allies' thinking on security and defence questions are increasing Europe's responsibilities and sparked the slow process of an upgrade of European military capabilities. But is this process being matched by meaningful advances in the EU's external policymaking? How far over the horizon can Europeans see?

Table 6 - Restructuring the EU's Political Decision-Making

Critics say EU decision-making is undemocratic and painfully slow. Whether true or false, eurosceptic populist parties have been able to capitalise on anti-EU prejudices to the point of destabilising the European project. What is the outlook for a renewed drive on institutional reform capable of streamlining the EU and meeting the challenges ahead?

09.30 - 11.00

SCENE SETTING Exploring the Scenarios for Europe in 2030

PLENARY SESSION OPTIONS, CHOICES AND CONSEQUENCES

The time has come for issues to be discussed and thought through in their own realm; to break through silos and develop a new type of policy thinking, which connects the dots of different policy issues. This session will also offer an opportunity to debate our scenarios for Europe in 2030.

11.00 - 11.30 Coffee break



STATE OF EUROPE

11

October 2018

11.30 - 12.45

PARALLEL SESSIONS

PARALLEL SESSION I MONEY MATTERS: Unfinished Business - What Boardrooms Want from the EU

The EU's single market has yet to be fully completed, and Eurozone governance reforms remain hotly disputed. EU competition rules and the growth of labour and skills shortages are both making businesses nervous about future growth potential. The single market has offered unique opportunities for business in and benefits for Europe's citizens. Are the voices of business in Europe a chorus or a cacophony?

PARALLEL SESSION II THE POLITICS OF THE FUTURE: A new social model for Europe: taxes, welfare and rights

Europe is aging and this has consequences for old and young alike. We are faced with the need to reinvent our tax and welfare systems both to meet the demands of an aging population and the needs of younger generations. The European social model is also burdened by increasing levels of inequality. Together these trends could be sources of major social disruption. What political and practical adjustments will be necessary? What role does migration into Europe have to play and how can we change the narrative on migration and make the most of the opportunities it presents for the Europe.

12.45 - 13.45 Lunch



13.45 - 14.15

IDEA SHARING I **CLIMATE CHANGE**

Adapting to a world of 10 billion people

Transformational changes to decarbonise the global economy are happening across the world and across all sectors as a result of technological innovation, new and creative policies and political will at all levels. How can we ensure we're on track to prevent dangerous climate change and realize the historic Paris Agreement?

IDEA SHARING II **RESOURCE DEPLETION**

Adapting to a world of 10 billion people

It is time to re-examine our relationship with food production and consumption and to rethink existing models to make them sustainable. What changes need to be made to global food governance and are European policymakers ready to adapt?

14.15 - 15.30

PARALLEL SESSION III **Money Matters: The brave new world of digital**

Digital developments are calling into question business model across all industries; the pace of AI, automation and big data are all drivers of future industrial policy with a knock impact on modes of consumption; jobs growth; skills development and tax policy. In this context of the brave new world of digital, where should Europe go – what policies need to be promoted to create a tech-friendly climate for European entrepreneurs and boost Europe's competitiveness in this field?

PARALLEL SESSION IV **Europe in a global world: Walking the talk on crafting a new global order**

As the US retreats from its historical commitment to the rules-based global order, global attention has centred on the EU's efforts to salvage the Iran nuclear deal, press ahead with the Paris climate talks and safeguard the multilateral trading system. Has international cooperation been reduced to bitter self-promotion, tariffs and raging twitter feuds? Are the G6 strong enough to uphold the Western-led rules-based global order and the international economy without US on board or should the EU go the extra mile by reaching out to non-Western international actors in order to co-create a new and more inclusive multilateral system?

15.30 - 16.00 Coffee break

STATE OF EUROPE

11
October 2018

16.00 - 16.30

SESSION **THE POLITICS OF THE FUTURE: EUROPEAN PARLIAMENT ELECTIONS: PEOPLE, PARTIES AND INTRUSION IN THE AGE OF BIG DATA**

European elections have so far been met by growing public indifference and waning voter turnouts. MEPs have an average half-million people in their constituencies, so the human touch is rare. But in this new age of Big Data could the EU's democratic deficit at last be filled and the relationship between citizens and Europe be reinvigorated? And how can next May's elections best be kept free of intrusion and interference, and reinvigorate the relationship between citizens and Europe?

16.30 - 17.45

TABLE DISCUSSIONS **HOW DO WE MAKE EUROPE MATTER?**

This session is dedicated to crafting policy recommendations for the next EU mandate based on Friends of Europe's scenarios for Europe 2030.

Our proposition is that the renewed social contract underpinned by three pillars of security, prosperity and sustainability can serve as the glue binding Europe together for the future, which enables it to be better connected to citizens' and business' needs and concerns.

CONCLUSIONS AND THE WAY AHEAD – EUROPE FIGHTS BACK

THE CONFIRMED PARTICIPANTS INCLUDE:



Negar Mortazavi,
Journalist and Iran
commentator; EYL
MENA



Ursula von der Leyen,
German minister of
defence



Jean-Claude Juncker,
European Commission
President



Louise Arbour,
UN Special
Representative for
International Migration



Derek Johnson,
Executive Director
Global Zero; EYL NA



Pascal Lamy,
Former Secretary
General of the World
Trade Organisation



Assita Kanko,
Founder Polin the
political incubator



Mounir Mahjoubi,
French Secretary of
State for Digital Affairs



Caroline de Gruyter,
EU Correspondent NRC
Handelsblad



Eva Kailli,
Member of the
European Parliament



Anette Idler,
Director of Studies,
Changing Character of
War Centre, University
of Oxford



Klaus Welle, Secretary
General of the European
Parliament



Lindsey Nefesh-Clarke,
Founder and Managing
Director of Women's
Worldwide Web; EYL40



Jean-Luc Lemerrier,
Corporate Vice
President, EMEA,
Canada and Latin
America at Edwards



**Anna Teresa
Lehmann,**
Portuguese State
Secretary for Industry



Tanja Gönner,
Chair of the
Management Board,
GIZ



Mario Monti,
Italian Senator and
former Prime Minister
of Italy



Corinna Cretu,
European
Commissioner for
Regional Policy



Dawood Azami,
Editor BBC World
Service; EYL40



Brune Poirson,
Secretary of State in
the French Ministry
for Ecological and
Inclusive Transition;
EYL40

THE CONFIRMED PARTICIPANTS INCLUDE:



Ciarán Devane,
Chief Executive of the
British Council



Muriel Penicaud,
French Minister of
Labour



Alexander Stubb,
Vice President of the
European Investment
Bank and former Prime
Minister of Finland



Anne Marie Imafidon,
Co-Founder and CEO
of Stemetite; EYL40



Carlos Moedas,
European
Commissioner for
Research; Science and
Innovation



Bruno Maçães,
Author 'The dawn of
Eurasia'



Imen Ben Mohamed,
Vice-Chair of the
committee on Economic
and Financial Affairs, Social
Affairs and Education of
The Tunisian Parliamentary
Assembly; EYL MENA



**Juliane Bogner-
Strauß**,
Austrian Minister for
Women, family and
youth



Alberto Alemanno,
Jean Monnet Professor
of EU Law and Founder
of The Good Lobby,
HEC Paris; EYL40



Cecile Wendling,
Head of Foresight
at AXA



Marietje Schaake,
Vice-Chair European
Parliament



Matti Maasikas,
Estonian Deputy
Minister for EU Affairs



Yostina Boules,
Founder and Managing
Director of Taqa
Solutions; EYL MENA



Jim Clarken,
CEO of Oxfam Ireland



Konrad Szymanski,
Polish Secretary State
of European Affairs



Ann Mettler,
Head of the European
Political Strategy
Centre, European
Commission



Iain Couzin,
Director of the Max
Planck Institute for
Ornithology, University
of Konstanz



Polly Toynbee,
Politics and Social
Affairs Columnist at The
Guardian



Jamie Shea,
Deputy Assistant
Secretary General,
North Atlantic Treaty
Organization at NATO



**Zanda Kalniņa-
Lukaševica**,
Parliamentary State
Secretary for EU Affairs
at the Latvian Ministry of
Foreign Affairs; EYL40



Friends of Europe

Connect. Debate. Change.

Rue de la Science 4, 1000 Brussels, Belgium

Tel: +32 2 893 98 25

Fax: +32 2 893 98 29

Email: info@friendsofeurope.org

friendsofeurope.org

Friends of Europe is a leading think-tank that connects people, stimulates debate and triggers change to create a more inclusive, sustainable and forward-looking Europe