



European Policy Centre **Annual Report 2025**

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"Language of Power" podcast on Spotify,
Deezer, YouTube and Soundcloud

Front cover image: Canva

Foreword



Brigid Laffan

President of the European Policy Centre (EPC)



Declan Kelleher

Chair of the EPC Governing Board

In an increasingly contested political and geopolitical environment, the European Policy Centre is moving in new directions. Our influence is growing as an agenda-setter, network-builder and defender of liberal democracy, in addition to remaining a trusted source of high-quality policy analysis. Trump's return to the White House reinforced many of the challenges that EPC had been anticipating, from European security and economic coercion to the resilience of liberal democracy. Our work is sharpening European leaders' focus on what Europe must do in response.

EPC addressed increasing threats to democracy, which culminated in our Annual Conference on "Liberal Democracy Under Threat". Bringing together leading European policymakers, thinkers and EPC members, we demonstrate that defending democracy must become a central part of Europe's strategic response to a changing world.

The Stiftung Mercator-funded "Connecting Europe" project has enabled EPC to grow its convening power, connecting think tanks, civil society, policymakers and business across Europe and beyond. This was explicitly recognised when EPC was named one of On Think Tanks' "100 Think Tanks to Watch in 2025," highlighting its innovation, collaboration and impact.

EPC publications, media presence, events and particularly our growing LinkedIn reach enabled EPC ideas to travel well beyond those directly participating in our work. Combined with our expanding convening power, we are not merely contributing to, but also shaping European debates.

We would like to express our sincere gratitude to EPC's staff, members and many partners, in particular the King Baudouin Foundation, for their continued trust, support and engagement. Thanks to their professionalism, EPC continued to provide a trusted platform for evidence-based ideas, informed debate and practical policy solutions.

2025 was a year when the world moved significantly closer to many of the risks EPC had been warning about. Our response was not to retreat into analysis, but to become a more active political-policy actor: generating ideas, building coalitions and networks, convening those who can act, and defending the principles on which European integration and liberal democracy depend.

Message from EPC's Management Team



The growing divisions of political debates in 2025 reaffirmed the importance of independent research, non-partisan insight and forward-looking analysis. EPC was a thought leader on economic security, EU reform and societal resilience, including health security and the brain economy.

The inaugural Brussels Economic Security Forum (BESF) helped to consolidate our position as a leading European voice on economic security. With the active participation of 250 policymakers, business leaders and experts from six continents, the Forum demonstrated EPC's ability not only to generate ideas, but to build international policy communities around emerging challenges.

The year also highlighted the growing importance of resilience in all its dimensions – economic, societal, geopolitical and democratic. Amid growing political polarisation and pressure on liberal democracy, we intensified our work on democratic resilience and the interaction between national politics and European integration.

EPC's most attended event focused on Europe's housing crisis; the most widely read publications examined EU's place in a changing world. Our 2025 flagship report "A Test of Times" envisions an EU that "thinks enlarged" and is future- and crisis-proof, with a modernized operating system. We highlight

the need for an "Open Supra-Governmental Avantgarde" (OSGA), through which 'willing and able' members could intensify cooperation, outside the EU's framework if necessary.

Our monitoring of political developments in the member states and candidate countries highlighted links between national politics, European decision-making, liberal democracy and the EU's capacity to act and deliver. Through close collaboration with our members, EU institutions and global partners, we continued to bridge expertise across policy areas and strengthen our reach. We also expanded our use of AI to enhance internal processes and our digital presence.

These achievements reflect the professionalism and dedication of EPC's staff, analysts, Strategic Council, Advisers, Academic Fellows, Governing Board and members. We thank EPC's supporters and friends, particularly the King Baudouin Foundation and Stiftung Mercator, who make our work possible.

Looking ahead, we remain committed to making Europe stronger, more secure, innovative and better for its citizens, while defending and renewing the liberal-democratic foundations of European integration. In an increasingly contested world, our ambition is a more resilient Europe, acting collectively and shaping its own future.

EPC in numbers

JANUARY – DECEMBER 2025

EPC Ideas shared via


222
Events


256
Publications


23
Podcast episodes of the
“Language of Power”

EPC Visitors and Subscribers


17,500+
Participants of EPC Events


773,000+
Visitors of the EPC website


75,000+
Views of EPC Publications


10,000+
Subscribers to
EPC’s newsletter


2200
Times people listened
to EPC’s podcast

EPC in (the) Media


2000
Mentions in
traditional media


1160
Followers on Bluesky


105,200
Followers on LinkedIn

Flagship events

5-6 June 2025:

The inaugural Brussels Economic Security Forum (BESF)

Former deputy Foreign Minister of Indonesia and ambassador to the US, Dino Patti Djalat; EPC Director Almut Müller; EEAS Managing Director for Global Issues and Communication, Olivier Bailly, and former Nigerian Minister and World Bank Vice President, Obiageli Ezekwesili.
© Sam Glazier / EPC



2 December 2025:

Liberal Democracy under Threat: Shaping a renewed vision for liberal democracy in Europe

EPC's Chief Executive Fabian Zuleeg.
© Elza Löw / EPC



Flagship Publication

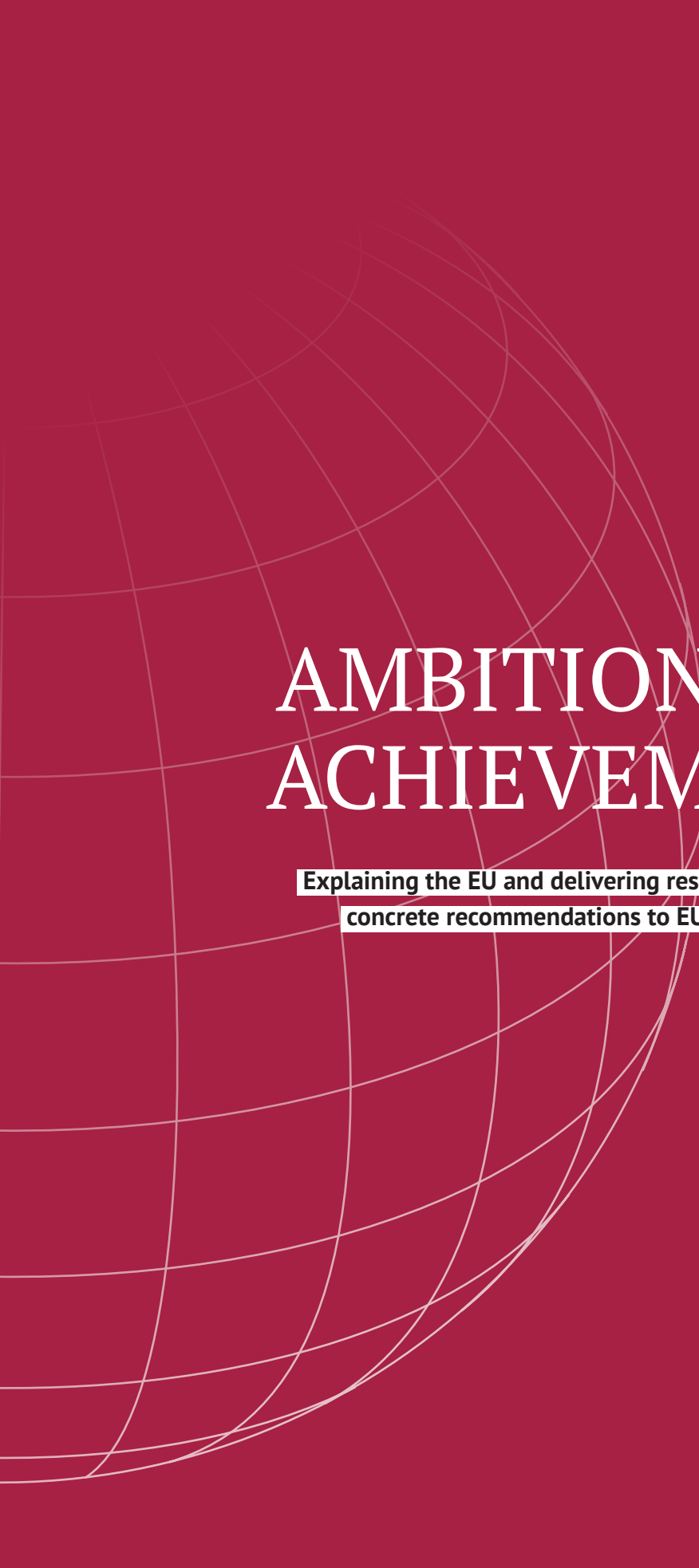
April 2025:

A Test of Times: Permacchange through enlargement and EU reform





The European Parliament.
© EC Audiovisual Service



AMBITION AND ACHIEVEMENTS

Explaining the EU and delivering research, analysis and
concrete recommendations to EU policymakers.

European Migration and Diversity

Leading informed debate, rigorous analysis and connecting migration to Europe's wider strategic challenges, EPC enables forward-looking policy dialogues on one of the defining issues facing Europe today. Linking migration governance to foreign policy, security, development and international cooperation, as well as national politics, EPC broadened the scope of migration debates beyond traditional policy silos. Headed by Dr Alberto Horst-Neidhardt, the European Migration and Diversity Programme asked if and how the EU will deliver on its ambitious migration and asylum policies following landmark reforms.

Migration and Asylum: Bridging Legal, Political and Societal Concerns

To enable sustainable and rights-based migration policies, EPC's multidisciplinary analysis connects various dimensions and perspectives. In 2025, it continued to shape

discussions on migration policy implementation, which will determine the success or failure of the recent reforms. EPC migration analysts took a strategic and evidence-based approach, looking beyond short-term political signalling to identify gaps and propose pragmatic policy options for more effective migration policies.

An EPC discussion with the European Commissioner for Internal Affairs and Migration, Magnus Brunner, explored more balanced approaches to migration and implementation of the EU's migration and asylum agenda. The "fireside chat" also addressed the EU response to member states that do not comply with EU law and policies.

In 2025, EPC analysts researched labour migration, exploring how Europe can enhance its attractiveness to global talent and strengthen its competitiveness, with a focus on the international mobility of students and trainees.

Migration Diplomacy, Returns and Climate Mobility

With shrinking development assistance budgets, geopolitical instability and a weakening multilateral order, EPC launched research on the EU's migration partnerships with neighbouring countries, examining its impact on broader European strategic objectives.

EPC contributed to the European Commission's 2025 proposal for a new Return Regulation, through inputs to their study on gaps and needs in relevant EU law. A joint policy dialogue with the Egmont Institute on the EU's approach on returns, held shortly after the Commission's policy proposal was presented, convened representatives of the European Parliament, Commission and Polish Presidency.

Collaboration with the European University Institute strengthened research on climate mobility. EPC increasingly connected migration policy with demographic change, labour market needs, climate adaptation and the long-term integration of displaced Ukrainians. Together with the Egmont Institute, the International Red Cross and PICUM (a network for undocumented migrant rights),



Ukrainian Deputy Prime Minister,
Oleksiy Chernyshov.

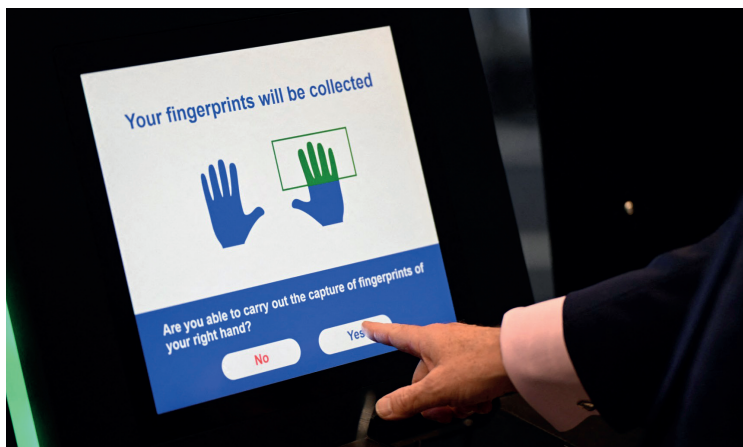
© EC Audiovisual Service



Afghan refugee in his container room in the former Tempelhof airport in Berlin.
© John MacDougall / AFP



Container in facility for refugees and asylum seekers in the former Tempelhof airport in Berlin.
© John MacDougall / AFP



The EU's new Entry-Exit System at the Eurotunnel border.

© Justin Tallis / AFP

EPC organised a policy dialogue and closed-door conversation with former Commissioner and then recently nominated Special Envoy Ylva Johansson on the temporary protection and the future of displaced Ukrainians in the EU.

Looking ahead to more Resilient and Sustainable Policies

Migration policy implementation, diplomacy and labour and climate migration will rise on the EPC 2026 agenda. It is deepening its analysis of the trade-offs between security, competitiveness, solidarity

and fundamental rights. As the EU enters a decisive phase in migration governance, EPC continues to ask how EU policies can be reconfigured in a post-liberal age of competing priorities.

With implementation of the Common European Asylum System reforms underway, EPC will assess whether member states can overcome persistent compliance gaps and translate legislative agreements into effective practice. EPC's research is increasing its ability to anticipate future policy challenges.

In anticipation of the 2026 Outlook Forum, EPC will adopt foresight methods, already explored in the paper on resilient migration policy, "EU migration and asylum at a crossroads: Planning for uncertainty." EPC's research and analysis of the "New Pact for the Mediterranean: Turning vision to impact" is leading to a 2026 event with EU Commissioner Dubravka Suica. EPC will continue to lead rigorous analysis and principled policy discussions in a field increasingly characterised by polarisation and political short-termism.

Top EPC Work on European Migration and Diversity

Publications:

- "EU migration and asylum at a crossroads: Planning for uncertainty"
- "Regulating the international mobility of students and trainees"
- "New Pact for the Mediterranean: Turning vision to impact"

Events:

- An outlook on the EU's approach on returns (March 2025)
- Advancing the EU's migration and asylum agenda: A conversation with EU Commissioner Magnus Brunner (June 2025)
- Policy Dialogue and closed-door conversation with former Commissioner and then recently nominated Special Envoy Ylva Johansson: After Temporary Protection: Staying in the EU, returning to Ukraine (October 2025)



Czech Elections.

© Roman Cejka / AFP

European Politics and Institutions

As the European Union navigates continued political fragmentation and pressure on democratic norms, EPC works to strengthen the legitimacy, accountability and responsiveness of EU governance. Led by Associate Director Dr. Corina Stratalut, the “European Politics and Institutions” Programme focused on the question “How should the EU reform its governance to become more strategic, efficient and legitimate?”

The Test of Times: Democracy and Reform under Pressure

The European Commission invited EPC to contribute to its 2025 consultations on the EU

Democracy Shield, the Union’s new initiative on democratic resilience – a measure of the programme’s standing in debates on democracy and illiberal trends.

EPC’s flagship publication, “A Test of Times”, outlines the strategic choices facing the EU in a context of geopolitical volatility. It argues that enlargement and EU internal reform must advance in tandem and reframes enlargement as a strategic necessity rather than a procedural exercise.

European Elections, Citizens and Democratic Innovation

Through its “EU Democracy Reform Observatory, EPC

examined citizen participation, democratic innovation and how EU decision-making can become more inclusive, transparent and participatory. Four EPC analysts specialised in a range of EU policies scrutinised and debated the European Commission’s first 100 days with participants of an in-person event.

The “Elections Monitor” series continues to analyse national elections and their implications for European democracy. In 2025, coverage included elections in Germany, Romania, Poland, Portugal, Kosovo and Albania.

EPC’s evidence-based analysis of Generation Z and the widening

gender divide has fed directly into emerging Brussels debates on masculinity, social cohesion and equality. For example, its discussion paper “From Provider to Precarious” explored how young men’s economic decline is fuelling the current antifeminist backlash.

Connecting the EU, Capitals and Candidates

EPC’s long-running research on the accession process – particularly on the conditionality and the credibility of the EU’s promises – underpins its role as a trusted platform for dialogue between EU institutions and partners in the Western Balkans.

In 2025, EPC hosted the Minister of Foreign Affairs of North Macedonia, Timčo Mucunski, and the Prime Minister of Montenegro, Miloško Spajić, as well as the Commissioner for Enlargement, Marta Kos. A workshop on civil society involvement in the accession process reinforced cooperation with regional think tanks and civil society actors, while timely events



on Serbia provided deeper insight into domestic political developments.

Moldova is one of the EU’s nine accession countries.

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Outlook: Values, Vision and Foresight

Looking ahead, EPC turns to the fundamental values and vision of the EU: “How and why should the EU and its members make the “United in Diversity” motto ring true again?” Its analysis treats diversity as an asset, linking to EPC’s research on EU migration policy.

EPC’s foresight work builds alternative scenarios for European democracy to 2030 and sets out the policy choices that follow from each. In 2026, the EPC is launching an annual Outlook Forum to share that work with EPC member organisations, media and EU policymakers – and to keep testing the EU’s democratic architecture, policymaking and delivery against what is coming.

Top EPC Work on European Politics and Institutions

Publication:

- A Test of Times: Permachange through Enlargement and EU Reform

Events:

- Policy briefing on EU Enlargement with Montenegro’s Minister of European Affairs, Maida Gorčević (April 2025)
- One year commemoration debate on the Serbian student protest with Croatian MEP Tonino Picula (November 2025)
- “Enlargement Package: What will it take to deliver?” with European Commission Director-General for Enlargement and Eastern Neighbourhood, Gert Jan Koopman (November 2025)

Serbian Protests.
© Andrej Isakovic / AFP



Europe's Political Economy

The EU's political economy is under increasing pressure. Intensifying geoeconomic tensions, the erosion of the rules-based economic order and the growing use of economic coercion are forcing the EU to rethink how it protects its economic interests. Led by Associate Director Georg Riekeles, EPC's "Political Economy Programme" asked: "How can the EU strengthen its economic security and deal with the trade-offs of economic crises and transitions?"

Leading the way on Economic Security

EPC was the first European policy think tank to put economic security firmly on the EU policy agenda. Its framing paper, "Europe's Make-or-Break Moment: Putting Economic Security at the Heart of the EU's Strategic Agenda" and European Commission President Ursula von der Leyen's seminal EPC address on EU-China

economic relations in March 2023 helped shape the early stages of Europe's economic security debate. Against the backdrop of the hardening international environment, the EPC has continued to explore EU responses to economic dependencies and coercion.

In 2025, EPC launched the inaugural Brussels Economic Security Forum (BESF). Held 5–6 June 2025, it brought together over 300 participants from five continents, including ministers from key third-country partners, three European Commissioners, CEOs and leading experts. European at its core, but global in outlook, BESF is founded on the conviction that Europe's economic security depends on building a strong community of like-minded international partners. It now connects leading think tanks from more than 10 countries, whose experts contributed to a joint compendium of research ahead of the now annual Forum.

Shaping EU policy on Competitiveness and Strategic Investment

EPC has helped shape the EU debate on competitiveness and the single market over several years. Joint research with the European Investment Bank helped establish mid-cap enterprises as a distinct category in EU single market policy. This work, alongside policy proposals on emerging critical technologies, was referenced in the 2024 Draghi Report and the EU's 2025 Competitiveness Report.

Europe's investment gap was at the heart of EPC's work on the interconnected economic, technological, climate and security challenges facing the EU. Its report on making the EU a strategic investment power was widely cited. Its subsequent analysis of the proposed European Competitiveness Fund contributed to discussions on the next Multiannual Financial Framework. EPC's proposal for an EU instrument capable of taking equity stakes in critical technological and industrial assets was also reflected in the European Commission's Tech Sovereignty package.

EPC's 2026 Economic Policy Outlook

EPC's work on strategic autonomy, economic security and competitiveness continues to be guided by the question:



Director Tovsak Pleterski of DG for Internal Market, Industry, Entrepreneurship and SMEs with EPC Policy Analyst Varg Folkman.

© Marko Milutinovic / EPC



“How can the EU best leverage its liberal economic model to succeed in a fracturing global order, characterised by coercion and escalating crises?”

In 2026, EPC is consolidating the BESF as a leading year-round platform shaping

international and European policies. European digital and technological sovereignty and the impact of AI on competitiveness, security and the social contract are new focus areas at the top of the EPC agenda.

EU Commissioner Seifčovič announcing Economic Security Strategy.

© Lukasz Kobus / EC Audiovisual Service

Top EPC Work on Europe's Political Economy

Publications:

- ▶ “Europe’s Make-or-Break Moment: Putting Economic Security at the Heart of the EU’s Strategic Agenda”
- ▶ “Doubling down, not backing down: Defending the EU’s Digital Sovereignty”
- ▶ “From mission polity to mission economy: Making the EU a strategic investment power”

Event:

- ▶ Brussels Economic Security Forum (June 2025)



The EC's Executive Vice-President for Tech Sovereignty, Security and Democracy, Henna Virkkunen, at the inaugural Brussels Economic Security Forum.

© Sam Glazier / EPC

Sustainable Prosperity for Europe

2025 marked the beginning of many post-election mandates, including of the European Parliament, the European Commission and the United States' national administration. At the start of President Ursula van der Leyen's second term, EPC followed and analysed the development of the EU's future budget priorities. Headed by Stefan Sipka, the "Sustainability Prosperity for Europe" Programme asked how to complete the Green Deal and ensure its implementation after the EU elections.

More broadly, EPC explored how to improve communication on the green transition, advance clean, secure and affordable energy, scale up circular economy and protein diversification, and how to enable investments in the clean transition. Beyond Europe, EPC

discussed green partnerships, climate diplomacy, and examined the implications of the second Trump mandate on the green agendas, including transatlantic collaboration.

EU announcements on Ocean Policy and Intergenerational Fairness

Several European Commissioners made key policy announcements and launched consultations at EPC events. Commissioner Glenn Micallef announced the work on the EU Intergenerational Fairness Strategy; Commissioner Costas Kadiš presented the European Oceans Pact, right after it was launched at the Third UN Ocean Conference in Nice. Commissioner Jessika Roswall spoke about the upcoming Circular Economy Act.

Linking the Green Transition to other Political Agendas

To help advance its thought leadership, relevance and impact, EPC featured innovative policy analysis and debates that linked the green transition with other political agendas, including on competitiveness, digitalisation and security.

EPC analysts explored the case for integrated land use that would enable at the same time energy generation, food production and nature restoration. EPC examined the synergies and trade-offs between the clean energy transition and economic security. It explored how defence spending, with its increased budgets, could be used to scale up European green steel.

EPC looked at the linkages between climate adaptation and the Intergenerational Fairness agenda and between the EU's coastal areas and the circular economy. EPC continued examining the role of digitalisation in advancing sustainability agendas, including on sustainable products and land use.

Looking Ahead to a Green Transition

In 2026, EPC continues to focus on the EU's green transition and asks "how to implement the Green Deal while safeguarding liberal democracy in the

EU Commissioner Roswall and EPC's Head of Programme, Stefan Sipka.

© Marko Milutinovic / EPC





context of rising populism and geopolitical tensions?”

In the ever-changing political context, EPC analyses the policy mix around the energy transition, industrial decarbonisation, circular economy, ocean governance,

climate resilience, nature restoration and protein transition. Integrating its climate perspective across all its thematic Programmes, EPC’s sustainability-related work also contributes to the ambition to help safeguard European liberal democracy.

A field of solar panels.

© Canva

Top EPC Work on Sustainable Prosperity for Europe

Publications:

- Resolving the Energy-Food-Nature Trilemma in Land Use
- Green Steel for European Defence: An enabler for decarbonisation, competitiveness and security?
- What the EU gets wrong on Climate and Gender Backlash

Events:

- EU Commissioner Micallef kicks off Strategy on Intergenerational Fairness (February 2025)
- EU Commissioner Kadis outlines Ocean Pact for Sustainable Seas (July 2025)
- EU Commissioner Roswall outlines Roadmap for the EU’s Circular Economy (October 2025)



CONNECTING
europe

Transnationalising policy debates: Connecting Europe

2025 unfolded against a challenging backdrop for civil society organisations and think tanks across Europe. Democratic backsliding, increasing political polarisation and growing pressure on independent organisations created a more difficult

operating environment. Headed by Johannes Greubel, the Transnationalisation Programme asked how to enhance transnational and transversal policy debates on major strategic issues across Europe?

Connecting Europe and Community Building

Funded by Stiftung Mercator, the “Connecting Europe” project seeks to connect civil society to EU policy debates in Brussels, thus transnationalising the exchanges on EU level. It supports civil society organisations (CSOs) through capacity building, advice and community action.

One of the key examples of this function is the project’s “Rule of Law Community”. EPC hosted more than 40 CSOs working on democracy, human rights and the rule of law for a two-day community meeting. The community has evolved into an active network, with regular exchanges and coordinated advocacy efforts, coordinated jointly with Democracy Reporting International.

Contributing to the start of EU budget negotiations, EPC brought the role of civic space to the forefront of resilient democracy in publications such as “Securing Europe’s civic space: Investing in democracy in the next MFF.” Through its events on the civic space, rule of law and enlargement, EPC hosted MEPs Tineke Strik,



© Canva



Daniel Freund and Michał Wawrykiewicz, and presidents of the European and Social Committee and of the European Fund for the Balkans.

Transnational and Transversal Policy Debates

By “thinking enlarged”, the EPC’s “Connecting Europe” project also brought organisations from EU candidate countries to Brussels to help shape European political discussions that reflect perspectives from across the continent. The concrete potential of CSOs beyond the EU was highlighted in the

paper “Thinking enlarged: Civil Society’s role in preparing for EU enlargement.”

European Think Tank Collaboration

Focusing on its peers among civil society, EPC also expanded its think tank cooperation in Europe and beyond. It regularly collaborates with more than 50 think tank members, including the “Think Tank Lab” and “On Think Tanks”, and is an active member of the 50-year-old Trans European Policy Studies Association (TEPSA). Together, they address common challenges: funding

The European Commission in Brussels.
© AFP

sustainability, institutional resilience and the consequences of a more hostile political environment. They continue to lay the groundwork for evidence-based advocacy on behalf of the sector.

Looking Ahead to a More Resilient European Democracy

EPC continues to grow its role as a hub for integrated and inclusive policy debates and



knowledge-sharing across Europe, based on a community of partners that exchange and jointly build capacities and advocacy efforts. Partnership-building and community-based approaches to policy engagement continue to deepen in 2026, guided by the question of how to promote transnational dialogue in a climate of renationalisation and shrinking civic space?

As pressures on independent expertise continue to grow, EPC will place greater emphasis on supporting democratic resilience, protecting civic space and extending its European networks across the globe. In Brussels, it remains a trusted and well-known convener of civil society organisations, think tanks and policymakers.

Ukrainian Flag by the European Parliament in Brussels.

© EC Audiovisual Service

Ahead of its 30-year anniversary, the EPC is also deepening its foresight expertise. Bringing together future scenarios based on multi-disciplinary research, 2026 will culminate in EPC's first Outlook Forum.

Top EPC Work on Connecting Europe

Publications:

- **Thinking enlarged: Civil Society's role in preparing for EU Enlargement**
- **Securing Europe's Civic Space: Investing in Democracy in the next MFF**

Europe in the World

As the rules-based world order erodes, the EU and its principles of multilateral cooperation are feeling the impact of massive geopolitical shocks. Russia's war against Ukraine, conflict in the Middle East, strained EU-China relations and uncertainty over future US security commitments have intensified pressure on the EU to act faster and with greater strategic purpose. In 2025, EPC worked to redefine the EU as a geopolitical actor, posing the question: "Aiming to redefine Europe's global engagement, how can the EU repower at a time of global uncertainty?"

Headed by EPC Director Almut Möller, the "Europe in the World" team provides foreign policy briefings to influential decisionmakers and institutions, as well as for – and tailored to – EPC member organisations, in Brussels and beyond. In 2025, EPC analysts explored EU relations with rising middle powers including South Africa, Indonesia and Australia, with the goal of strengthening security and restoring global influence. Committed to the EPC's diverse perspectives, it is engaged with the Women, Peace and Security agenda.

Beyond Europe: EPC on the Global Stage

EPC expanded its global reach in 2025. New partnerships with government and civil society actors in Japan, India and the broader Indo-Pacific continue to bear fruit. Partnerships with Türkiye and the Middle East have resulted in concrete EPC

activities, including an online event series on the Middle East and "Unpacking Turkish Foreign Policy".

EPC also continued to lead the "EU and China Think Tank Exchanges", working with the EU Delegation to China and think tanks and universities across the EU and China. Regular exchanges on a full range of issues have placed EPC as a leading, impartial and influential voice on EU–China relations.

The growing European and global partnerships are laying the ground for effective think tank networks and platforms, involving all themes and Programmes covered by the EPC.

- The "Northern Europe Platform" was launched in 2025, as an umbrella for activities in the Arctic-Nordic-Baltic regions.
- The "Global Think Tank Partnerships Initiative" is growing strategic ties with think tanks across the globe,

including by deploying the EPC's vast network of European think tanks via its "Connecting Europe" project.

Global partners include the Institute of Geoeconomics (Japan), the Korea Development Institute (South Korea), the Africa Policy Research Institute (Nigeria/Germany), the Atlantic Council (US) and the Royal United Services Institute (UK), the world's oldest defence and security think tank.

Transnational collaborations enable EPC and its partners to ground their analysis on evidence and insights from a diversity of geographical, sectoral, cultural and national perspectives. It also helps build coalitions of research and policy advocacy to counter a fragmenting world.

"The Language of Power", Defence and Security

EPC organised a series of high-level events — in Berlin, Paris and Brussels — on comprehensive security, private financing for defence and how



Ukraine-EU Relations.

© Canva



to spend Europe's extra defence budgets. The debates were underpinned by publications on European deterrence and defence in the age of mass precision warfare. EPC also influenced the European Commission's White Paper on Defence, with its analysis of the mobilisation of industrial, human and financial resources for defence purposes.

Doubling down on Ukraine

With the Deputy Head of Programme, Amanda Paul, the "Europe in the World" team is the leading Brussels think

tank for activities related to Ukraine. It regularly cooperates with Ukraine's leadership, civil society and other key stakeholders to research, convene decisionmakers and enable Ukrainian advocacy. It researches the global impact of Russia's war and helps to debunk Russian disinformation.

EPC has focused on developing concrete ideas for a future peace agreement and security guarantees for a just and sustainable end to the war. It also shaped policy agendas by drawing greater attention to issues

MEP Strack Zimmerman and EPC Policy Analyst Maria Martisiute.

© Marko Milutinovic / EPC

that receive less coverage: the situation of Ukrainian prisoners of war and civilian detainees, stolen children and the heinous situation in Ukraine's temporarily occupied territories. Highlighting Ukraine's accession process and EU sanctions on Russia have also positioned the EPC as an influential actor on Ukraine.

EPC's Global Outlook

In its next decade, EPC will continue to "go global" and grow its foresight work. EPC's flagship annual Outlook Paper provides foresight and political scenarios on the future of Europe in the World. The 2026 edition will serve as the intellectual foundation for the EPC Outlook Forum. EPC's global work will address the how Europe can reassert peace and "shape a foreign policy that stands up against

EPC's Language of Power podcast: Hosted by Paul Taylor, Senior Visiting Fellow and former head of the Brussels Reuters bureau, the bi-monthly podcast continues to explore how the European Union exercises power in an increasingly unstable global environment. The episodes analysed concrete policy dilemmas – from sanctions and defence to democratic backsliding, geopolitical rivalry and the EU's relations with major powers. Episodes are available via the EPC website, YouTube, Amazon Music and Deezer.



a world of transactionalism, ‘might is right’ and weak global institutions.”

In addition to the long running “Thought Leadership Forum”, EPC is re-launching the “EPC Talks Geopolitics” series,

tailoring it to its business members. EPC members continue to exchange and benefit from analyst insights on geopolitical and economic developments, and their impact on the worlds of business and trade.

Presidents Costa, De Wever, Orban and Zelenskyy.
© Stephanie LeCocq and Pool / AFP

Top EPC Work on Europe in the World

Publications:

- EU–China relations at a crossroads, Vol. IV: Fifty-Fifty
- Quick march! Ten steps for a European defence surge
- Europe in the World in 2025: Navigating a perilous world with realism and ambition

Events:

- Peace in Ukraine, Europe’s security and the role of Europe at the negotiation table (March 2025)
- European Defence Innovation Dialogue (November 2025)
- From alignment to action: Advancing EU-Japan economic and security cooperation (November 2025)

Health and Societal Resilience

With social and health security directly impacting citizens' lives, EPC examines a range of interconnected political challenges, beyond defence and economic security. Headed by Associate Director Elizabeth Kuiper, the Health and Societal Resilience Programme continues to call for more holistic and multidisciplinary policymaking. In 2025, her team addressed the strategic question: "How can the EU strengthen societal resilience for a strong and secure Europe?"

Critical Medicines, Women's Health and Inequalities

EPC plays a central role in policy discussions on health resilience and competitiveness in the biopharmaceutical sector. In March 2025, the Rapporteur of the European

Parliament in charge of the Critical Medicines Act invited EPC to present its research and advice to Parliament. The European Parliament and EPC also co-hosted a public debate on women's health and its integration in the EU's gender equality strategy.

EPC's work on EU health resilience culminated in many recommendations on "Rebuilding Governance and Resilience out of the Pandemic" (REGROUP), based on empirical evidence and a normative evaluation of COVID-19 policy responses.

Brain Health and Hybrid Intelligence

Linking AI to the brain economy, EPC advances discussions on how human

cognitive capabilities can drive Europe's competitiveness. Working with global leaders and experts in the brain economy, including EPC's co-director of the Brussels Economic Security Forum, Paweł Świeboda, EPC co-authored commentaries driving the discussion. Publications such as "How the brain economy can unlock new approaches to AI" promote neuroscience-informed policies and investment in cognitive skills and mental health. The larger European ambition is to progress in an AI that amplifies human potential rather than undermines it.

AI and the Future of Work and Health

With AI and its EU regulation at a pivotal moment, EPC is guiding European decisionmakers to enable AI to enhance European innovation in healthcare and the broader economy, while also considering its social implications. Dialogues such as "AI in Health: Navigating the future of European healthcare" brought together policymakers, researchers, and industry to address trust, privacy and the integration of AI across research, innovation and clinical care.

Based on its research on "AI's impact on Europe's job market", EPC began calling for a European "AI Social Compact" to enable greater income security, European cohesion and investments in



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inclusive upskilling. As part of the European Research Area's Policy Agenda, the European Commission asked the EPC to contribute to its "Agenda for the Future of Work". The EPC's resulting multi-disciplinary study focused on policy outlooks for employment innovation.

Affordable Housing

EPC has contributed to elevating housing to a strategic EU priority, highlighting the need for collaboration among municipal, national, regional and European government institutions. Drawing on examples from Denmark, Spain, Poland and Czechia, the EPC has highlighted the importance of

empowering municipalities and regions through access to EU funding, technical support and co-investment mechanisms.

The European Commission's Director General for Employment, Social Affairs and Inclusion and the Chair of the EU's Housing Task Force led discussions at the EPC's most attended event in 2025 on "Investment in social and affordable housing". The participants explored how the EU can enable social and affordable housing through innovative financial instruments, including social bonds, a social impact index and a broader social taxonomy.

EPC's Outlook for Societal Resilience

EPC will continue to zoom in on whole-of-society resilience, addressing the economic implications of demographic changes, the digital transition including AI, and the social consequences of the green transition. In 2026 EPC asks the strategic question: "How can social policies contribute to restoring agency and trust in EU institutions?"

EPC's increasing focus on European preference in the health sector is enhancing its policy work around critical medicines and European biopharmaceutical innovation. Demography research is leading to evidence-based recommendations for greater intergenerational solidarity. The series of events and publications on women's health will also continue in 2026 and beyond.



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Top EPC Work on Health and Societal Resilience

Publications:

- "Rebuilding Governance and Resilience out of the Pandemic"
- "How the Brain Economy can unlock new approaches to AI"
- "AI's impact on Europe's job market"

Event:

- Investment in social and affordable housing (February, 2025)





TEAM

We aspire to provide a safe, healthy and rewarding working environment for our team, and exceptional research and analysis for our members and decision-makers.

Management Team



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Chief Executive and Chief Economist



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TATIANA CAFTEA

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TARA KOLJENSIC

Project Management Assistant

GOVERNANCE

**The EPC is committed to transparency, independence
and drawing from a multitude of perspectives
and nationalities in its governance model.**

Governing Board

The main function of the Governing Board is to provide EPC's strategic direction, monitor and evaluate its operations and implementation of its strategic plan. Powers relating to day-to-day management are delegated to the Chief Executive, who acts as EPC's Legal Representative.

The Governing Board meets three to four times per year. Members are appointed by the General Assembly, which is made up of former and current Board members. In line with Belgian law, the General Assembly meets once a year to formally approve the annual accounts and adopt the budget for the year ahead.



DECLAN KELLEHER

Chair; Former Permanent Representative of Ireland to the European Union



SUSAN DANGER

CEO of Camino



AUDREY-FLORE NGOMISK

CEO of Trianon Scientific Communication



STEFAN SCHÄFERS

Head of European Affairs of the King Baudouin Foundation



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NATHALIE TOCCI

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LEEN VERMEERSCH

Founder and Director of Flandrienella Ltd.



FABIAN ZULEEG

Secretary to the Board, Chief Executive of the European Policy Centre

Strategic Council

The Strategic Council brings together thought leaders and experts from diverse backgrounds and nationalities. They bring fresh insights and forward-looking perspectives on the major challenges facing

the European Union. Once a year, they meet with our analysts to reflect on the strategic priorities of the Union and their implications for the work and strategic direction of the EPC.

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Herman Van Rompuy

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Zeger Vercouteren

Vice President of Government Affairs and Policy, Europe, the Middle East, and Africa at Johnson & Johnson

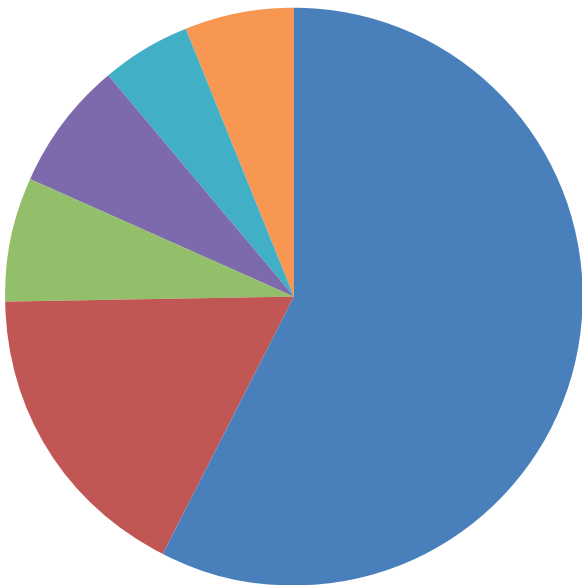
Financing

The European Policy Centre (EPC) is committed to sound financial management and to transparency in respect of its funding sources. EPC is an independent think tank and none of the financing it receives affects its independence in any way. By the same token, any financial support received for EPC activities does not commit the funding organisations. The views expressed in publications are solely those of the authors.

EPC’s total income in 2025 was €5,822,086. It ended the financial year with a surplus of €14,845, bringing the equity capital to €1,686,184.

Approximately 21% of EPC’s 2025 funding came from grants. The King Baudouin Foundation, EPC’s strategic partner, provided a grant of €400,000. Stiftung Mercator supported EPC with a grant of €436,135 for the joint initiative “Connecting Europe”. Equinor donated €290,000 to the Friends of EPC Fund. The EU-funded CERV Programme (Citizens, Equality, Rights and Values) provided €290,000.

Membership fees accounted for 17% of EPC’s budget, with a total of €986,031. The remaining 57% of funds, a total of €3,332,42, came from a wide range of organisations, in the form of support for events and publications.



57%
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17%
MEMBERSHIP
FEES

7%
PROGRAMME
PARTNER
MERCATOR
GRANT

7%
STRATEGIC
PARTNER KBF
GRANT

5%
EU OPERATING
GRANT (CERV)

7%
OTHER GRANTS
AND DONATIONS

BALANCE SHEET

As of 31 December	2025	2024
Fixed Assets		
<i>Intangible Fixed Assets</i>	0	3,673
<i>Tangible Fixed Assets</i>		
Net furniture & equipment	25,088	41,230
Financial Fixed Assets	848	848
Total Fixed Assets	25,936	45,751
Current Assets		
Debtors	544,161	688,631
Banks	2,112,860	1,570,196
Accruals	318,079	836,077
Total Current Assets	2,975,100	3,094,904
Current Liabilities		
Creditor Loans & Accruals	288,401	273,876
Deferred Income	1,026,451	1,195,440
Total Current Liabilities	1,314,852	1,469,316
Net Current Liabilities	-1,660,248	-1,625,588
Long-term Liabilities	0	0
TOTAL EQUITY	1,686,184	1,671,339

INCOME & EXPENDITURE STATEMENTS (abridged)

As of 31 December	2025	2024
Income		
Members' subscriptions	986,031	1,027,375
Grants and donations	1,500,051	1,229,584
Programmes & other	3,336,004	3,480,205
Total income	5,822,086	5,737,164
Expenditure		
Office expenses	-490,226	-525,026
Operations expenses	-1,033,306	-957,987
HR and experts expenses	-4,283,709	-4,025,778
Total expenditure	-5,807,241	-5,508,791
Surplus (+) / Deficit (-) for the year	14,845	228,373
PROPER FUNDS	2025	2024
Initial funds	425	425
Prior period funds (+)/ Forwarded deficit (-)	1,220,914	992,541
Reserve for social liabilities	450,000	450,000
Surplus (+) / Deficit (-) for the year	14,845	228,373

Proper funds	1,686,184	1,671,339
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Acknowledgements



King Baudouin
Foundation

Working together for a better society

The King Baudouin Foundation has been a strategic partner to EPC since 2002. A Belgian public benefit foundation, it fosters cohesion and builds bridges within Europe.

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



Co-funded by
the European Union

The Citizens, Equality, Rights and Values (CERV) Programme co-funded EPC's operations from 2022 to 2025, through the project ELEVATED. In line with EPC's mission and CERV priorities, ELEVATED helped strengthen Europe's public sphere around

values, policies and citizens' rights. It empowered citizens, especially youth movements, to actively participate in debates on the future of the EU, transnationalisation, democratic and fundamental rights, welfare and social inclusion.



MEMBERSHIP

**Our membership is drawn from a broad spectrum of organisations,
representing the main stakeholders concerned with
EU affairs at the local, regional, national and international level.**

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Industry and Employers
Confederation of Norwegian
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Care Association
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Macao Economic and Trade Office

Mission of Andorra to the EU

Mission of Canada to the EU

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and Embassy of Georgia to the
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Mission of Switzerland to the EU

Mission of the Faroes to the EU

Mission of the Kingdom of
Morocco to the European
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Mission of the People's Republic
of China to the European
Communities

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to the EU

Mission of the Republic of North Macedonia to the EU

Mission of the Republic of Serbia to the EU

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Permanent Representation of Finland to the EU

Permanent Representation of France to the EU

Permanent Representation of Greece to the EU

Permanent Representation of Hungary to the EU

Permanent Representation of Ireland to the EU

Permanent Representation of Lithuania to the EU

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Permanent Representation of the Republic of Cyprus to the EU

Taipei Representative Office in the EU and Belgium

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CMI - Martti Ahtisaari Peace Foundation

European Cultural Foundation

European Foundation Centre

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Friedrich Naumann Foundation for Freedom

Hanaholmen - Swedish-Finnish Cultural Centre

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King Baudouin Foundation

Konrad-Adenauer-Stiftung

Oceano Azul Foundation

Open Society European Policy Institute

Porticus

Prytula Foundation

Sitra - Finnish Innovation Fund

Software AG - Stiftung

Stichting PhotonDelta

Stichting QDNL

Stiftung Mercator

Wilfried Martens Centre for European Studies

WMG Foundation

GOVERNMENTAL ORGANISATIONS (4)

Bundesagentur für Arbeit

Caisse des Dépôts Groupe

Kommerskollegium - National Board of Trade

Representative Office of the Austrian National Bank

INTERGOVERNMENTAL ORGANISATIONS (12)

Council of Europe

EFTA Secretariat

EFTA Surveillance Authority

European Bank for Reconstruction and Development

European Investment Bank

IMF – International Monetary Fund

International Centre for Migration Policy Development

International Organization for Migration

NATO Parliamentary Assembly

The World Bank

UN Development Programme

UN High Commissioner for Refugees - UNHCR

NON-GOVERNMENTAL ORGANISATIONS (48)

Amnesty International

Asylos

Belgian Cystic Fibrosis Association

Centre for European Progression - C4P

Centre for Innovation in Medicine

Council of Bars and Law Societies of Europe (CCBE)

Danish Refugee Council

Deutsche Stiftung Weltbevölkerung - DSW

DiasporaVote!

ECRE – European Council on Refugees and Exiles

Equality and Human Rights Commission

Equity Index (The Advocacy Team)

EUCRTA – European Centre for Research, Transparency and Accountability

EUROCITIES

Europa Union Frankfurt

European Alliance for Patient Access - EAFPA

European Association of Urology - EAU

European Brain Council

European Centre of Excellence
 European Council on Refugees and Exiles
 European Scientific Working group on Influenza- ESWI
 European Specialist Nurses Organisation - ESNO
 European Stability Initiative
 Fair Wear Foundation
 FOSTER EUROPE
 HIAS Europe
 Housing Europe
 Integrity Initiatives International Europe
 International Federation of Library Associations and Institutions - IFLA
 International Partnership for Human Rights
 International Rescue Committee
 Internet Society
 Junior Enterprises Europe
 Médecins du Monde Belgium
 Network of European Foundations for Innovative Cooperation
 ONE Campaign
 Oxfam International EU Advocacy Office
 Platform for International Cooperation on Undocumented Migrants
 Red Cross EU Office
 Sitchting Circle Economy
 Social Progress Imperative
 Solidar Tunisie
 Sustainable Digital Infrastructure Alliance eV
 Transparency International EU
 Ukrainian Think Tanks Liaison Office in Brussels
 Ukrainian World Congress

União das Mutualidades Portuguesas (UMP)
 VoteWatch Europe

THINK TANKS (69)

 Africa Policy Research Institute (APRI)
 Agora Energiewende
 AICGS
 Asian Institute of Diplomacy and International Affairs - AIDIA
 Aspen Institute Romania
 Barcelona Centre for International Affairs - CIDOB
 Carnegie Europe
 Center for Applied Research in Partnership with the Orient (CARPO)
 Centre for Economic Strategy
 CEU Democracy Institute
 Climate & Company
 Clingendael Institute
 Confrontations Europe
 Cyprus Center for European and International Affairs (CCEIA)
 Diplomeds
 E3G
 Ecologic Institute
 eco-union
 EGMONT - The Royal Institute for International Relations
 EPIS Thinktank
 Equilibrium Institute of Budapest
 EU Awareness Centre
 European Commons Network
 European Council on Foreign Relations - ECFR
 European Institute of Romania
 European Policy Institute

European Social Survey
 EUROPEUM
 Finnish Institute of International Affairs - FIIA
 Georgian Foundation for Strategic and International Studies (Rondeli Foundation)
 German Council on Foreign Relations
 German Institute for International and Security Affairs - SWP
 German Marshall Fund of the United States
 German-Ukrainian Bureau (DUB)
 Global Relations Forum - GRF
 Global Round Table
 GLOBSEC
 Gulf Research Center Foundation
 Hellenic Foundation for European and Foreign Policy - ELIAMEP
 IAI Istituto Affari Internazionali (IAI)
 IDHUS Institute
 Ilko Kucheriv Democratic Initiatives Foundation
 Institute for European Environmental Policy - IEEP
 Institute for European Policies and Reforms - IPRE
 Institute for Strategic Dialogue - ISD Germany
 Institute of World Economics (HUN-REN CERS)
 interface
 International Center for Future Generations VZW - ICFG
 International Centre for Defence and Security - ICDS
 International Centre for Policy Studies
 LINKS Europe Foundation
 Missions Publiques

Moldova-EU Club
 Nossa Europa
 ODI Europe
 Odysseus Academic Network (ULB)
 Oxygen for Democracy
 Pew Research Center
 Polish Economic Institute
 Political Capital Institute
 Real Instituto Elcano
 Research Center of the Slovak Foreign Policy Association
 RUSI Europe
 Securing America's Future Energy Foundation - SAFE
 Swedish Institute for European Policy Studies - SIEPS
 Think Tank EUROPA
 Tony Blair Institute for Global Change - TBIGC Belgium
 Trends
 Ukrainian Prism Europe

REGIONAL BODIES AND LOCAL AUTHORITIES (28)

Central Denmark EU Office
 Central Sweden European Office
 City of Vienna - Liaison Office
 Conference of Peripheral Maritime Regions of Europe
 Delegation of the Basque Country to the EU
 Delegation of the Government of Catalonia to the EU
 Hanse-Office
 HM Government of Gibraltar - Representation to the EU
 Lombardy Region Government - EU Office

Lower Austria Liaison Office
 North Sweden European Office
 Office of the Northern Ireland Executive
 Region Östergötland
 Region Skåne European Office
 Representation Office of Carinthia
 Representation of Lower Saxony to the EU
 Representation of the Free State of Bavaria to the EU
 Representation of the State of Baden-Württemberg to the EU
 Representation of the State of Bremen to the EU
 Representation of the State of North Rhine-Westphalia to the EU
 Scottish Government EU Office
 Stavanger Region European Office
 Steiermark Büro
 Stockholm Region EU Office
 Turkish Cypriot Representation in Brussels
 Welsh Government
 West Finland European Office
 West Norway Office

RELIGIOUS ORGANISATIONS (5)

Commission of the Bishops' Conferences of the European Union
 Conference of European Churches
 EU Office of The Church of Jesus Christ of Latter-day Saints
 European Evangelical Alliance
 Protestant Church in Germany - Brussels Office

ACADEMIC (2)

Institute for Legal Research of University of Coimbra (UCILER)
 National University Odessa Law Academy

OTHERS (3)

International Committee of the Red Cross
 Japanese Bank for International Cooperation (JBIC)
 KfW



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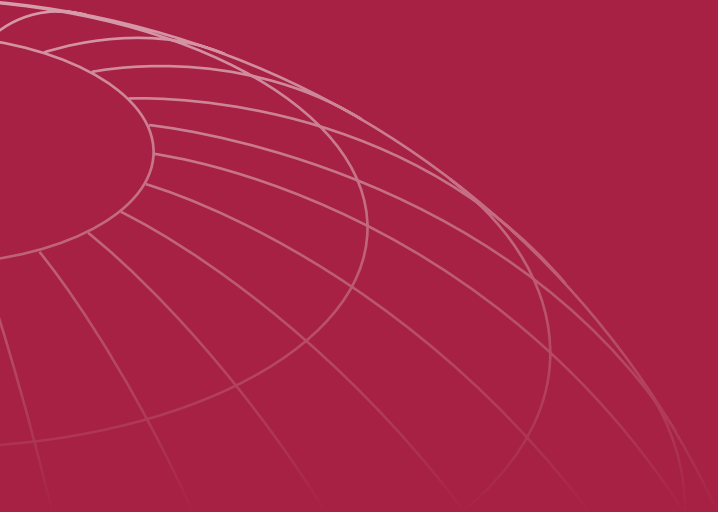
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