



"From European Strengths to EU Power"

Policy Note - Digital Capacity

Digital Resilience and European Power in the AI Era

January 15-17, 2026 | Brussels, Belgium

*A briefing informed by the discussions of the Third European Conclave,
under the responsibility of the Conclave Executive Board members in their individual capacity.*

Conclave Executive Board: Guillaume KLOSSA (Chairman), Aart de GEUS (Vice Chairman), Philippe ÉTIENNE, Mariya GABRIEL, Peter GRK, Maria João RODRIGUES, Grégoire ROOS

Conclave Advisory Board: António VITORINO (Chairman), Piero BENASSI, Małgorzata BONIKOWSKA, Jean-Pierre BOURGUIGNON, Ivan KRASDEV, Stjepan ORESKOVIC, Dimitris PAPALEXOPOULOS, Daniela SCHWARZER, Jean-Marie SOLVAY, Erika STAËL von HOLSTEIN, Loukas TSOUKALIS, Guntram WOLFF, Malte ZABEL



“From European Strengths to EU Power”

FOREWORD

THE CONCLAVE WAS CREATED TO ADDRESS THE UNTHINKABLE.

At a time when European debates were largely dominated by the management of successive crises, **the ambition of the Conclave was to create a space where Europeans could project themselves beyond the turbulence of the moment and reflect on the long-term future of the continent.**

Created with the support and participation of António Costa — now President of the European Council — and with the contribution of major European foundations and corporations, the Conclave brought together a small and diverse group of influential Europeans: prime ministers, entrepreneurs, researchers, trade unionists, civil society leaders, and citizens who had participated in the Conference on the Future of Europe.

The first Conclave, held in November 2023, anticipated what many still considered unlikely: the return of the law of the strongest in international relations.

One year before the second election of President Donald Trump, participants analysed the emergence of a world increasingly shaped by geopolitical rivalry, imperial ambitions, and the growing risk of global disorder. The fifty first Conclavers reached a common conclusion: **Europeans could no longer remain spectators of global power dynamics.**

Europe would have to transform the European Union into a global, sustainable and responsible power, capable of acting in a world increasingly structured by the rivalry of major powers such as the United States and China. But this **European power would be different in nature: it would pursue no imperial domination and remain anchored in international law, multilateral cooperation and democratic legitimacy.**

SUCH A TRANSFORMATION WAS NOT PRESENTED AS AN OPTION BUT AS A NECESSITY. WITHOUT IT, EUROPEANS WOULD RISK BECOMING THE OBJECT RATHER THAN THE SUBJECT OF GLOBAL POWER COMPETITION.

The second Conclave, held in early 2025 in the presence of the Presidents of the European Council and the European Economic and Social Committee, as well as the Prime Minister of Belgium, translated this diagnosis into a concrete agenda.

The report “A Power Agenda for a Global, Sustainable, and Responsible Europe” proposed a series of strategic priorities: developing an independent European defence and security capacity, regaining scientific and technological leadership, and building a new partnership strategy with key global actors such as India, Brazil, and Canada.

Since then, many of these ideas have entered the European debate and begun to influence the agenda of European institutions and national governments.

Recent developments — from growing geopolitical instability to the threat of annexing Greenland, a European territory — have further accelerated this awakening. **The debate about transforming the European Union into a global power is no longer a taboo.**

[The third Conclave](#) therefore focused on identifying the key conditions for such a transformation.

- First, **Europe must seize its momentum for a bold growth agenda**. Discussions held in the presence of the President of the European Investment Bank, Nadia Calviño, highlighted the urgency of developing such an agenda. Competitiveness alone will not be enough. Without stronger growth, Europe risks a gradual decline that would weaken its capacity to defend its interests and fuel political fragmentation.
- Second, **Europe must ensure its technological and digital resilience**. Artificial intelligence, digital infrastructures and data ecosystems have become essential components of economic competitiveness, security and democratic sovereignty.
- Third, **Europe must renew its democratic model and reconnect citizens with the European project**, building a new generation of democratic participation adapted to the digital age and protected from external technological influence.

In this respect, we want to highlight an initiative of which many Conclavers have chosen to be Co-Founders, the [Europa Power Initiative](#), a unique societal, cultural and civic movement¹: its objective, to contribute to create the societal and political dynamics enabling the EU and Europe to transform into a new generation global, sustainable and responsible citizen-driven power and avoiding relegation to a protectorate completely resonates with the works and recommendations of the last Conclave.

These discussions confirm a central reality: Europe possesses extraordinary assets — scientific excellence, economic strength, democratic institutions, and a unique model of cooperation.

Among these assets is something historically unprecedented: **nearly half a billion free citizens who uniquely combine both national citizenship and European citizenship**. This dual democratic belonging constitutes one of the most powerful political innovations of modern history and gives Europe a singular capacity to act collectively while preserving the diversity of its nations.

Far from witnessing a civilisational decline, Europe may in fact be entering a new phase of expansion. For the first time in history, a political community is growing and attracting new members not through domination or strength relationships, but through **equality between states, the rule of law, fundamental human rights, shared prosperity, and sustainable development**. Through these principles, the European project seeks to give *civilisation* its fullest expression.

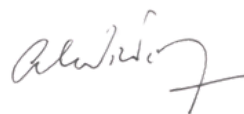
Europe must now develop the political will and strategic coherence necessary to transform these assets into power.

THE CONCLAVE WAS CREATED TO ADDRESS THE UNTHINKABLE.

Its ambition today is to help Europeans achieve what may soon become unavoidable: the emergence of a European power capable of shaping the future rather than suffering it.

Guillaume KLOSSA
Chairman of the Conclave

António VITORINO
Chairman of the Advisory Board



¹ Launched in 2025 at the initiative of a dozens of personalities including Philosopher Slavoj Žižek, Business Leaders Jean-François van Boxmeer and William Kadouch-Chassaing, Trade Unionist Ether Lynch, former EU Commissioners Mariya Gabriel, Nicolas Schmit and Margrethe Vestager with the engagement of 250 Co-Founders and the contribution of several European Parliament Representatives, including first Vice-President Sabine Verheyen, and Vice-President Younous Omarjee.

"From European Strengths to EU Power"

OVERVIEW

The Question of Power

Across the continent, citizens, institutions, and governments are rediscovering a question that had long remained implicit within the European project: the question of power. Where public debate understandably focuses on the urgency of crises, spaces for strategic reflection become indispensable. They allow us to step back from the immediacy of events and to consider the long-term direction of our collective project. This was and is the ambition behind the creation of the Conclave.

Conclave 2026

The third edition of the Conclave, which took place in Brussels in January 2026, focused on **Growth, Democracy, and Geopolitics** — with **digital capacity as a cross-cutting theme** — under the overarching perspective: *"From European Strengths to EU-Power."* The exchanges resulted in four policy briefs.

The key recommendations of each thematic brief are outlined below.

Geopolitics

- Build a Post-American Order for Europe
- Support Ukraine and Defend Europe
- Engage Member States to Deliver on Shared Defense Priorities
- Boost European Defense Innovation
- Operationalise the Mutual Assistance Clause in the EU Treaty Article 42.7
- New Formats of Partnership and Cooperation in Trade and Public Goods

Growth

- Barriers Down for Firm Dynamics
- Single Markets for Services and Digital
- Free Way for a Capital Markets Union
- Increase Public Investment
- Allocate Defense Resources as a Catalyst for Productivity and Industrial Renewal

Digital Capacity

- Activate Demand and Procurement as the Fastest Sovereignty Lever
- Act Across the Full Digital Stack, Not Isolated Technologies
- Embed AI into Industrial and IoT Products Before the Next Product Cycle Closes
- Secure Democratic Resilience Through Sovereign Digital Public Infrastructures

Democracy

- Extend Qualified Majority Voting in Targeted Domains
- A European Sovereign News Infrastructure
- A Democratic Sovereignty Doctrine
- From Participation to Democratic Intelligence
- Trusted European Datasets to Strengthen AI Integrity

DIGITAL RESILIENCE & EUROPEAN POWER IN THE AI ERA

Rapporteur: Pietro Morandini, Deputy Secretary General of Europa Power Initiative

The Conclave benefited from a special workshop organized in cooperation with ASML and Ericsson, two major European technology companies, where we addressed the question: “**How can Europe strengthen its technological resilience?**” Furthermore, the sessions dedicated to this question highlighted the importance of digital capabilities for growth, democracy, and geopolitics. To present these findings coherently, we are publishing a policy brief on technology, digital resilience, and artificial intelligence.

Key recommendations include:

- **Activate Demand and Procurement as the Fastest Sovereignty Lever**
- **Act Across the Full Digital Stack, Not Isolated Technologies**
- **Embed AI into Industrial and IoT Products Before the Next Product Cycle Closes**
- **Secure Democratic Resilience Through Sovereign Digital Public Infrastructures**

EXECUTIVE SUMMARY

1. Activate Demand and Procurement as the Fastest Sovereignty Lever

(Decision window: 12–18 months)

Translate Europe’s digital ambitions into coordinated public demand for trusted European cloud, data, and AI solutions. Without early reference contracts, European providers will not reach scale.

2. Act Across the Full Digital Stack, Not Isolated Technologies

(Decision window: by end of 2026, before the next Digital Decade national roadmap updates and Commission assessment cycle)

Move from fragmented initiatives to stack-wide prioritisation: infrastructure, data, compute, AI, chips, connectivity, and skills. Europe’s greatest structural asset remains the EU27 internal market. When effectively harmonised, it offers a scale comparable to global competitors and can act as a powerful engine for growth, profitability, and investment for European digital companies.

3. Embed AI into Industrial and IoT Products Before the Next Product Cycle Closes

(Decision window: 18–24 months — inference)

If Europe does not industrialise AI-enabled products rapidly, competitors — notably China — risk locking in global standards and markets through faster hardware-software integration.

4. Secure Democratic Resilience Through Sovereign Digital Public Infrastructures

(Decision window: 2025–2027)

Leverage current momentum on media freedom and platform governance to deploy European digital infrastructures for pluralistic information and civic debate.

Setting the Scene & Key Structural Challenges

Context: Digital Resilience as a Condition of European Power

The Digital Resilience reflections at the Conclave 2026 confirmed that digital sovereignty has become a structural condition of European power, shaping competitiveness, security, industrial autonomy, and democratic integrity.

This assessment aligns with the EU's strategic trajectory under the 2030 Digital Compass and its operational translation in the Path to the Digital Decade Policy Programme, which organises Europe's digital transformation around four cardinal points:

1. Digitally skilled population and highly skilled professionals
2. Secure, performant and sustainable digital infrastructures
3. Digital transformation of businesses
4. Digitalisation of public services

The Digital Decade framework is distinctive in that it couples ambition with governance: measurable targets, annual reporting, national roadmaps, corrective mechanisms, and multi-country projects to address scale and fragmentation. However, digital sovereignty cannot be delivered by strategy papers alone.

European institutions are not technology developers, and innovation trajectories cannot be centrally planned. At the same time, the private sector will not deliver strategic outcomes without:

- credible and aggregated demand,
- regulatory and investment predictability,
- long-term political commitment.

This insight mirrors the logic of the Digital Decade itself, which moved away from declaratory targets toward implementation discipline through monitoring, benchmarking, and coordinated action.

Yet a contradiction persists: while sovereignty is now central to EU discourse, public administrations continue to procure predominantly non-European digital solutions, especially in cloud, collaboration tools and data services.

Policy implication

Digital resilience must be pursued primarily through market-shaping instruments — procurement, deployment obligations, and demand aggregation — complementing regulation and funding, including public contracts with business including clauses of protection of the European interest.

Geopolitical Context

The Conclave also underlined the geopolitical relevance of digital resilience, particularly in the context of security and defence. Europe increasingly faces hybrid threats in which digital infrastructures, data and AI-enabled systems play a central role. Addressing these challenges requires the development of European digital solutions with dual-use applications, such as AI-enabled drones and secure communication systems, which can serve both civilian purposes (infrastructure monitoring, emergency response, logistics) and defence needs, while strengthening European strategic autonomy and interoperability.

Strategic Game Changers

→ Demand and Infrastructure: From Targets to Scale

At Conclave 2026, a strong consensus emerged to reinforce the Digital Compass emphasis on secure and sustainable digital infrastructures as the technological backbone of sovereignty. These include:

- trusted cloud and data infrastructures,
- cross-border digital public services (e-identity, e-invoicing, product passports),
- interoperable systems enabling the single market.

However, participants stressed that infrastructure only becomes sovereign when it is used at scale. Europe's greatest structural asset remains the EU27 internal market. When effectively harmonised, it offers a scale comparable to global competitors and can act as a powerful engine for growth, profitability, and investment for European digital companies. Fragmentation — in regulation, standards, certification, procurement practices, and market access — continues to prevent European firms from scaling across borders and from fully capturing the value of the single market.

From an industrial perspective, sovereignty, and competitiveness converge: a unified market reduces compliance costs, accelerates deployment, and increases the commercial attractiveness of European solutions. From a strategic perspective, it allows Europe to leverage demand at scale, anchor investment decisions, and reinforce technological autonomy across the stack.

Digital sovereignty cannot be achieved through technological initiatives alone. It requires the completion and effective functioning of the EU27 digital internal market as a prerequisite for scale, profitability, and resilience.

Decision window: 12–18 months (inference based on procurement and budget cycles)

If Europe does not rapidly translate infrastructure strategies into coordinated procurement and deployment, market momentum will consolidate around incumbent non-European providers, raising switching costs and long-term dependency.

Policy implication

- Use the Digital Decade governance tools — common KPIs, cooperation mechanisms, and multi-country projects — to aggregate demand and create European reference markets.
- Prioritise harmonisation of rules, standards, and certification across the EU27 for strategic digital technologies.
- Use Digital Decade governance tools (national roadmaps, monitoring, multi-country projects) to address fragmentation that prevents cross-border deployment.
- Treat market integration as a growth and competitiveness policy, not only as a regulatory objective.

→ Artificial Intelligence: From Excellence to Diffusion

Deterministic narratives that Europe has already “lost” the AI race are to be rejected. Current AI deployment remains largely incremental, and the next phase will be shaped by integration into products and systems, not models alone.

Europe's strategic opportunity lies in embedding AI into:

- industrial machinery and manufacturing systems,
- energy and mobility infrastructure,
- connected devices, IoT and telecoms,
- health and regulated public services.

This interpretation is consistent with the Digital Compass, which treats AI progress as inseparable from infrastructure, skills, business adoption, and public-sector digitalisation.

Decision window: 18–24 months (inference based on industrial and IoT product cycles)

If Europe does not rapidly deploy AI-enabled industrial and IoT products, competitors with vertically integrated hardware-software ecosystems risk capturing global markets and setting de facto standards.

Policy implication

Shift emphasis from AI research alone to AI deployment and diffusion, supported by access to data, compute and early demand from industry and public services — making the best of the EU Apply AI Strategy.

→ Data Spaces and Digital Commons as Strategic Infrastructure

Participants emphasised that data access, governance, and location are now core sovereignty issues. Europe’s vulnerability stems not only from technology dependence, but from the fact that European data is often processed and valorised outside Europe.

The Digital Decade explicitly links economic transformation and public-service modernisation to trusted data processing and interoperability. Sectoral European data spaces — in health, energy, mobility, industry, and public administration — were identified as key enablers of AI and ecosystem formation.

Decision Window: 2025–2027 (inference aligned with Digital Decade milestones)

Delayed uptake of data spaces risks leaving European firms without access to high-quality datasets, while global competitors consolidate proprietary data advantages.

Policy implication

Treat data spaces and digital commons as a framework for a digital innovation strategy with strong interaction between supply and demand, supported by deployment incentives and public-sector uptake.

→ Dependency Management Across the Digital Stack

A central conclusion was that full digital autonomy is neither realistic nor necessary. The appropriate response is strategic independence management.

Europe cannot, and should not, aim to compete across every layer of the digital stack. In certain segments — particularly where global competitors have already achieved overwhelming scale, capital intensity and ecosystem lock-in.

Europe’s strength lies precisely in its ability to make selective, strategic choices: deliberately pulling back from segments where catch-up is structurally implausible, while redirecting investment, talent, and policy focus toward areas where Europe can still catch up, differentiate, or leapfrog.

This includes upstream and downstream layers where Europe retains industrial depth, system integration capacity, standards-setting power, or unique combinations of hardware, software and real-world deployment. Strategic selectivity was therefore framed not as retreat, but as industrial realism — a necessary condition to concentrate resources, accelerate time-to-market, and reinforce Europe’s competitive position in high-impact segments of the stack.

Drawing on the Digital Decade’s monitoring logic, participants proposed distinguishing between:

- critical dependencies (must be reduced or controlled),
- strategic dependencies (must be diversified and safeguarded),
- acceptable dependencies (managed through regulation and diplomacy).

This applies across the stack: chips and memory, cloud and data, platforms and AI compute.

Policy implication

Introduce a formal hierarchy of digital dependencies into Digital Decade implementation and multi-country projects, ensuring coherence between industrial policy, security, and external action.

→ Digital Sovereignty, Democracy, and the European Public Sphere

Digital resilience is not only economic, but democratic.

Europe’s near-total reliance on non-European platforms for news distribution and public debate creates structural risks for media pluralism and civic resilience — concerns also addressed by the European Media Freedom Act, entering into application from 2025.

In this context, participants recalled a concrete Conclave proposal from last year: the creation of a European digital infrastructure for independent media, enabling news outlets to distribute content through a shared, open, and non-proprietary framework.

This initiative — now moving into implementation — aims to:

- strengthen pluralism,
- reduce platform dependency,
- and provide digital public infrastructure while preserving editorial independence.

Decision window: 2025–2027 (inference aligned with EMFA rollout and platform governance reforms)

Failure to act risks entrenching platform concentration precisely as Europe is reinforcing its media-freedom framework.

Policy implication

Digital sovereignty strategies should explicitly include sovereign digital public spaces for information and democratic debate.

→ Enforcement, Credibility, and Power

Participants underlined that sovereignty begins with implementation. Regulatory ambition loses strategic value if enforcement is uneven or delayed.

The Digital Decade itself recognises governance, monitoring, and corrective action as conditions for delivery.

Policy implication

Effective enforcement of existing digital rules is not merely legal compliance, but a strategic signal shaping investment and competition.

Conclusion

The Conclave 2026 findings on Digital Resilience and AI converge on a clear message: **Europe does not lack strategies, talent, or values. It risks losing time, scale, and momentum.**

Digital resilience in the AI era is a race of deployment, integration, and governance discipline. The cost of inaction is not static dependency, but accelerating vulnerability.

CONCLAVE EXECUTIVE & ADVISORY BOARD MEMBERS



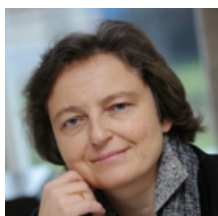
Guillaume KLOSSA (FR) – *Chairman of the Conclave*

Writer, social and tech entrepreneur, executive President of EuropaNova, former special adviser on Artificial intelligence of the Vice President of the European Commission



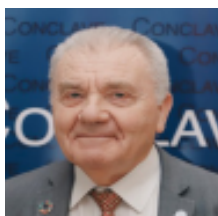
Piero BENASSI (IT)

Ambassador of Italy (ret.), Permanent Representative of Italy to the EU (2021-2023), Columnist at La Repubblica



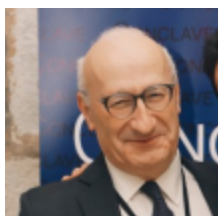
Dr. Malgorzata BONIKOWSKA (PL)

President of the Centre for International Relations



Jean-Pierre BOURGUIGNON (FR)

Mathematician, former President of the European Research Council, member of the Academia Europaea



Philippe ÉTIENNE (FR)

Ambassador of France in Germany (2013-2017) and the USA (2019- 2023), former diplomatic adviser to the French President of the Republic (2017- 2019)



Mariya GABRIEL (BG)

Assistant Director General for Communication and Information at UNESCO; Deputy Prime Minister and MFA Bulgaria (2023–2024); European Commissioner (2017–2023); Member of the European Parliament (2009-2017).



Aart de GEUS (NL)

Former Minister of Social Affairs of The Netherlands and OECD Deputy Secretary General



Peter GRK (SI)

Ambassador, Secretary General of the Bled Strategic Forum



Ivan KRASTEV (BG)

Founder and Chairman of the Board, Program Director Global Affairs, Center for Liberal Strategies



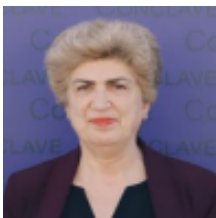
Stjepan ORESKOVIC (HR)

Founder and Majority Shareholder, Bosqar Invest



Dimitris PAPALEXOPOULOS (GR)

Chairman of Titan Cement International



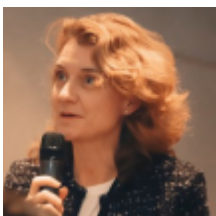
Maria João RODRIGUES (PT)

Former Minister of Employment of Portugal and MEP, final negotiator of the Lisbon Strategy, the Lisbon Treaty and the European Pillar of Social Rights



Grégoire ROOS (FR)

Director, Europe, Russia, and Eurasia at Chatham House



Dr. Daniela SCHWARZER (DE)

Political scientist, member of the Executive Board of the Bertelsmann Foundation



Jean-Marie SOLVAY (BE)
Chairman of the Board of Directors, Solvac SA



Erika STAËL von HOLSTEIN (SE)
Chief Executive of Re-Imagine Europa



Loukas TSOUKALIS (GR)
President of ELIAMEP Athens, Professor Sciences Po, Paris



António VITORINO (PT)
Former European Commissioner and former Director general of the International Organization for Migration



Guntram WOLFF (DE)
Professor of economics at Université libre de Bruxelles Senior Fellow Bruegel



Dr. Malte ZABEL (DE)
Director of the Programme Europas Zukunft at Bertelsmann Stiftung

The Board is assisted by:



Michaël CHRISTOPHE (FR)
Executive Director of EuropaNova, former Diplomatic Advisor to the President of the Economic, Social and Environmental Council, and to the French Government

*Contact: Mr. Michaël CHRISTOPHE – Executive Director of EuropaNova
+33 6 61 78 52 25 / michael.christophe@europanova.eu*

CONCLAVE PARTICIPANTS

Julien ANFRUNS (FR) – Secretary General of Europeanova; Lawyer.

Piero BENASSI (IT) – Ambassador; former Diplomatic Adviser to the Prime Minister of Italy and former Italian Permanent Representative to the European Union.

Dr. Malgorzata BONIKOWSKA (PL) – President of the Centre for International Relations, President of THINKTANK - Leaders Hub.

Martin BOROWIECKI (AT) – Senior Economist at the OECD.

Prof. Jean-Pierre BOURGUIGNON (FR) – Mathematician, former President of the European Research Council and Director of IHES.

Jean-François van BOXMEER (BE) – Chairman of Vodafone; Chairman of the European Round Table for Industry (ERT).

Gilles BRIATTA (FR) – Senior Counsel at Gide Loyrette Nouel (since 2023); former Group General Secretary at Société Générale (2015–2021); Vice-president of EuropaNova.

Dr. Cristina CAFFARRA (IT) – Economist, Eurostack Founder and Chair.

Nadia CALVIÑO (ES) – President of the European Investment Bank.

Laurent COULIE (BE) – Chief Executive Officer of Belgium's 40 under 40.

Aart Jan DE GEUS (NL) – Former Minister of Social Affairs of the Netherlands; former OECD Deputy Secretary-General and Chairman of Bertelsmann Stiftung.

Prof. Robbert DIJKGRAAF (NL) – President-elect of the International Science Council; former Minister of Education, Culture and Science of the Netherlands.

Sandrine DIXSON-DECLÈVE (FR) – Honorary President/Global Ambassador, The Club of Rome; Co-Author & Executive Chair, Earth4All.

Christine DURINX (BE) – Managing Director at VIB, a leading life-sciences research and innovation institute in Belgium.

Philippe ÉTIENNE (FR) – Ambassador of France; former Ambassador to the United States and Germany; Sherpa to President Macron (2017–2019).

Sven FRANCK (FR) – Former Co-President of Volt France.

Nicola FRANK (DE) – Media expert, Member of Council for European Public Space, Member of the Lie Detectors' Board.

Mariya GABRIEL (BG) – Assistant Director General for Communication and Information at UNESCO; Deputy Prime Minister and MFA Bulgaria (2023–2024); European Commissioner (2017–2023); Member of the European Parliament (2009–2017).

Anthony GOOCH GALVEZ (ES) – Secretary General at the European Round Table for Industry (ERT).

Dr. Heather GRABBE (UK) – Senior Fellow at Bruegel; Visiting Professor at University College London.

Dr. Giovanni GREVI (IT) – Senior Associate Fellow at the Centre for Security, Diplomacy and Strategy, Brussels School of Governance.

Peter GRK (SI) – Secretary General of the Bled Strategic Forum and National Coordinator for the Western Balkans at the Ministry of Foreign Affairs of Slovenia.

Lars GROTEWOLD (DE) – Chief Executive Officer of Stiftung Mercator.

Pierre GURDJIAN (BE) – Independent director, Chair of the Board and Chair of the Finance Committee at Solvay.

Frank HEEMSKERK (NL) – Executive Vice-President of Public Affairs & Countries at ASML.

Manuel HEITOR (PT) – Director of the Technology Policy Lab (Instituto Superior Técnico, University of Lisbon) and former Minister for Science, Technology and Higher Education of Portugal.

Reiner HOFFMANN (DE) – Chair of the German Council for Sustainable Development.

Dr. Ilham KADRI (BE) – Special Advisor and former CEO of Syensqo; Vice-Chair of the European Round Table for Industry.

Bahadır KALEAĞASI (TR) – President of the Bosphorus Institute; former Secretary-General of TÜSİAD.

Leyla KAYACIK (TR) – Former Special Representative of the Secretary General on Migration and Refugees at the Council of Europe; Secretary General of the Europa Power Initiative.

Guillaume KLOSSA (FR) – Chairman of the Conclave, President and Founder of EuropaNova, CEO of T-life; former Special Adviser on artificial intelligence and platforms to the VP of the European Commission (2018–2019). Writer and tech and civic entrepreneur. Former EBU director.

Andrius KUBILIUS (LT) – European Commissioner for Defence and Space, former Prime Minister of Lithuania.

Bart LAURENT (BE) – Brigadier General in the Belgian Army and former Director of Operations at the European Union Military Staff (EUMS).

Em. prof. Dr. Godelieve LAUREYS (BE) – President of the Royal Flemish Academy of Belgium for Science and the Arts (KVAB).

Simona LESKOVAR (SI) – Ambassador, Program Director of the Bled Strategic Forum.

Andrew LLOYD (UK) – Vice-President, Government and Policy Advocacy at Ericsson.

Ana MAIQUES (ES) – Chief Executive Officer and Co-Founder of Neuroelectrics.

Dr. Martin MÜLLER (CH) – Executive Director Science Anticipation at the Geneva Science and Diplomacy Anticipator.

Prof. Stjepan OREŠKOVIĆ (HR) – Professor of Medicine at the University of Zagreb; Founder, Bosqar Invest; Member, European Academy of Sciences and Arts.

Dimitris PAPALEXOPOULOS (GR) – Chair of TITAN Group; member of the European Round Table for Industry.

Wolfgang PINNER (DE) – Economist. Senior Manager in financial institutions in Germany, France, and Luxembourg. Former COO/DGA BNP Paribas Leasing Solutions.

Wilfried REMANS (BE) – Senior Public Manager of European Public Affairs BNP Paribas.

Sebastian REYN (NL) – ASML Head of Geopolitics and Global Advocacy.

Yury REVICH (AT) – Violinist, Composer and Cultural Leader; Artistic Director of Festival Nights and UNICEF Honorary Representative.

Maria João RODRIGUES (PT) – Former Minister and Member of the European Parliament, President of FEPS think tank, full professor of European economic policies.

Grégoire ROOS (FR) – Director of the Europe and Russia and Eurasia Programmes at Chatham House.

Nicolas SCHMIT (LU) – FEPS President-Elect, European Commissioner for Jobs and Social Rights (2019–2024); Minister for Labour, Employment and Immigration of Luxembourg (2009–2018); Permanent Representative of Luxembourg to the European Union (1998–2004).

Jean-Marie SOLVAY (BE) – Chairman of the Board of Directors, Solvac SA.

Prof. Céline SPECTOR (FR) – Professor of Political Philosophy at Sorbonne University.

Erika STAËL von HOLSTEIN (SE) – Chief Executive Officer of Re-Imagine Europa.

Andrej STUCHLIK (DE) – Senior Policy Advisor, European Investment Bank.

Pawel ŚWIEBODA (PL) – Senior Fellow, European Policy Centre and Centre for Future Generations, Co-Director, Brussels Economic Security Forum.

Vessela TCHERNEVA (BG) – Deputy Director, European Council on Foreign Relations.

Prof. Dr. Paul TIMMERS (NL) – Visiting Professor at KU Leuven, Former Director DG CONNECT.

Yannick TREIGE (DE) – Senior Manager, Government Affairs Europe, ASML.

Dominique TRINQUAND (FR) – General, International Relations Expert; President of DHT Conseil, former Head of the French military mission to the UN.

António VITORINO (PT) – Former European Commissioner and former Director general of the International Organization for Migration; Chairman of the Advisory Board of the Conclave.

Prof. Dr. Guntram WOLFF (DE) – Professor of economics at Université libre de Bruxelles, Senior Fellow Bruegel.

Dr. Malte ZABEL (DE) – Director Europe Programme, Bertelsmann Stiftung.

Dr. Jeromin ZETTELMEYER (DE) – Director of Bruegel.

Hugo ZSOLT DE SOUSA (PT) Economist, Senior Advisor EU and International affairs, former country director at the National Democratic Institute and Tony Blair Institute.

PARTNERS OF THE THIRD EUROPEAN

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We gratefully acknowledge the support of our partners, without whom this event would not have been possible.

The Conclave, as a new annual gathering, offers an open invitation to prospective partners passionate about shaping the future of Europe.

Our partner's participation is about becoming part of a movement that envisions a dynamic, forward-thinking Europe. By supporting this new annual tradition of strategic foresight and intellectual exchange, they contribute to a richer, more inclusive dialogue that reflects the diverse perspectives essential for a holistic European vision.

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