The Juncker Commission's ten priorities

State of play in autumn 2018

STUDY

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This publication provides an up-to-date overview and analysis of the state of play in the delivery by the European Commission of the various legislative and other political initiatives flowing from the ten priorities defined by its President, Jean-Claude Juncker, when the Commission took office in 2014.

This paper draws on a wide range of EPRS publications and updates a previous edition, The Juncker Commission's ten priorities – State of play in early 2018, published in January 2018. It has been compiled and edited by Isabelle Gaudeul-Ehrhart, with contributions from across the Members' Research Service and the Directorate for Impact Assessment and European Added Value of EPRS. The following policy analysts, in particular, contributed to the analysis: Piotr Bakowski, Angelos Delivorias, Gregor Erbach, Roderick Harte, Elena Lazarou, Tambiama Madiega, Nora Milotay, Shara Monteleone, Anja Radjenovic, Magdalena Sapala, Christian Scheinert, Marcin Szczepanski, Laura Tilindyte and Sofija Voronova. The graphics have been prepared by Nadejda Kresnichka-Nikolchova and Giulio Sabbati, and are derived from the on-line 'Legislative Train Schedule' application, launched by Parliament to track progress on the Commission's legislative proposals.

Executive summary

As the current European Commission enters the final stage of its mandate and with less than nine months to go until the European Parliament elections in May 2019, the immediate period ahead will be crucial for Jean-Claude Juncker and his fellow Commissioners in delivering on the promises and commitments for his five-year term.

What is the state of play of the various legislative and other initiatives announced by the Commission since taking office in 2014? How many of the commitments made have led to formal proposals so far? And how many of those proposals – whether in the form of legislation, other major political initiatives, or international agreements – have been brought to fruition, demonstrating that the EU institutions have collectively 'delivered'?

This paper takes stock of what the Commission has done – or not done – both with regard to its own commitments and in response to explicit requests for action made by the European Parliament, with both a statistical breakdown and a qualitative evaluation. It forms part of the on-going series of evaluations being issued throughout the 2014-2019 Commission's period in office.

Our analysis suggests that overall, almost four years after taking office, the Commission has tabled 89 per cent of proposals foreseen (482 out of 543). These have to be discussed by the European Parliament and Council, and negotiations are needed to reach their final adoption and publication, a democratic process which takes time. So far, 40 per cent of Commission proposals have been adopted by the co-legislators (216 out of 543), and another 34 per cent are proceeding well (183 out of 543). Progress varies from one policy field to another. With regard to the tabling of proposals, the rate is high in areas such as international trade, justice and fundamental rights, and the union of democratic change (98, 93 and 100 per cent respectively). However, in the areas of jobs, growth and investment, almost a quarter of the proposals expected (23 per cent) have still not been submitted. As for adoption of proposals by the co-legislators, in some priority areas, such as the digital single market, and justice and fundamental rights, almost half of the proposals submitted have been adopted (46 and 42 per cent respectively); in others, such as jobs, growth and investment, progress is slower (28 per cent). Overall, evidence nevertheless suggests that, step by step, the European institutions are collectively enacting the 'Juncker plan', but that work still remains to be done. European institutions are aware that, with less than nine months to go until the next parliamentary elections, they need to show that Europe can deliver for its citizens when and where it matters.

This paper seeks to provide an independent, objective and authoritative tool for Members of the European Parliament and those interested more widely to assess the performance to date of the current Commission. It is both exhaustive – in covering all the ten priority areas that the Commission set itself – and selective – as it focuses, for each priority, on the main initiatives and their latest developments. It aims to be both quantitative and qualitative: for each of the ten priorities, it offers a quantitative snapshot of the various initiatives at the key stages of their adoption, complemented by a qualitative assessment of the situation. These graphs are regularly updated on the 'Legislative Train Schedule' which features on the European Parliament's website.

In this edition, Section 3 introduces a special feature on the next multiannual budget plan, which it is hoped can be adopted during the course of this parliamentary term.

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Terminology used in this analysis

Proposals currently foreseen: Legislative proposals, and to a lesser extent initiatives such as communications and action plans, announced by the European Commission in its annual work programmes or State of the Union addresses.

Proposals still to be submitted: Legislative proposals, and to a lesser extent initiatives such as communications and action plans, announced by the European Commission in its annual work programmes or State of the Union addresses, but which have not yet been tabled.

Proposals so far submitted: European Commission initiatives that have been tabled and on which the co-legislators - European Parliament and Council - have started work.

Proposals submitted but not yet adopted: this category includes:

- **Proposals proceeding normally:** Proposals which are under consideration by the European Parliament and Council in the normal course of the legislative procedure;

- **Proposals close to adoption:** Legislative proposals close to finalisation (for example, when agreement has been reached at trilogue level);

- **Proposals proceeding slowly or blocked:** Initiatives blocked by an institution or under negotiation for more than two years; or legislative initiatives or legislative proposals announced by the European Commission but with no follow-up for more than nine months.

Proposals so far adopted: Legislative proposals finalised and adopted by the two co-legislators, the European Parliament and the Council.

Proposals submitted but subsequently withdrawn: Legislative proposals withdrawn by the European Commission.

Proposals requested by the European Parliament but not yet proposed: European Parliament requests for legislative action, notably in the context of legislative initiative reports in the policy fields covered by the Juncker Commission's ten priorities, but not yet followed up by the Commission.

1. Introduction

This paper assesses the latest state of play in the delivery of the over 500 proposals which the European Commission, under its President, Jean-Claude Juncker, has committed to introduce during the course of its five-year term from 2014 to 2019, as part of the ten priorities it defined when it took office. Published nine months before the next European Parliament elections, and about one year before the end of the current Commission's mandate, it comes at a time when the focus is increasingly on what still needs to be presented, negotiated, adopted and enacted. It looks in detail at the progress of the various initiatives announced by the Commission, reviewing what the Commission has presented so far, assessing what has been tabled compared with what was promised, and examining what the EU institutions have been able – or unable – to collectively enact, in order to address Europe's most pressing challenges and the expectations of its citizens.

Setting priorities for the future

The 10 priorities defined by the European Commission in 2014

Prior to his election as President of the European Commission in July 2014, Jean-Claude Juncker set out the policy priorities that would serve as the political mandate for his five-year term in office, with the aim of making a difference and delivering concrete results for citizens:

1. A new boost for jobs, growth and investment
2. A connected digital single market
3. A resilient energy union with a forward-looking climate change policy
4. A deeper and fairer internal market with a strengthened industrial base
5. A deeper and fairer economic and monetary union (EMU)
6. A reasonable and balanced free trade agreement with the United States
7. An area of justice and fundamental rights based on mutual trust
8. Towards a new policy on migration
9. Europe as a stronger global actor
10. A union of democratic change.

The multiannual budget plan for 2021-2027

In addition to delivering on these 10 priorities, the Commission has also been preparing the budget plan for the period from 2021 onwards, as the current multiannual financial framework (MFF), designed for 2014-2020, comes to an end. This edition dedicates a special section to the Commission's proposals, the Parliament's position and the ongoing negotiation process.

Anticipating and adapting

Since taking office, the European Commission has worked along its President's 2014 guidelines. It has also regularly announced additional initiatives to adapt to emerging crisis and challenges, notably on the occasion of the annual State of the Union addresses, and withdrawn certain proposals when it has deemed it appropriate. As a result, the figures presented in the graphs that appear in this regularly updated publication vary from one edition to another.

As with any exercise of this kind, but particularly in the light of this evolving environment, caution should be exercised when seeking to rate progress or make comparisons. Overall, however, this in-depth analysis reveals that the areas where most proposals have been submitted are the digital

single market (priority 2), international trade (priority 6), justice and fundamental rights (priority 7) and union of democratic change (priority 10). By contrast, it is in the key areas of jobs, growth and investment (priority 1), energy union and climate change (priority 3), internal market (priority 4), economic and monetary union (priority 5), and Europe as a stronger global actor (priority 9) that the Parliament and Council are still waiting for proposals that the Commission has announced but not yet tabled. Our overview also shows that there are a number of areas where the European Parliament has requested specific action but where the European Commission had not followed up by August 2018 (33 in total).

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

The Juncker Commission's ten priorities	All priorities	
Total number of Commission proposals currently foreseen (2014-2019)	543	
Proposals still to be submitted	61 / 543	11%
Proposals so far submitted	482 / 543	89%
Proposals submitted but yet to be adopted	266 / 543	49%
of which: Proposals proceeding normally	183 / 543	34%
Proposals close to adoption	29 / 543	5%
Proposals proceeding slowly or blocked	54 / 543	10%
Proposals so far adopted	216 / 543	40%
Proposals submitted but subsequently withdrawn	20	
Proposals requested by EP but not yet proposed	33	

A busy legislative schedule until the European elections

Against this background, the period between now and the 2019 European elections is likely to be extremely active as the co-legislators strive to make progress and adopt as many of the outstanding legislative proposals as possible, as well as reaching agreement on the next multiannual budgetary plan. This period will be as busy as it will be interesting in terms of assessing whether the European institutions can indeed deliver, as they have committed to do under the joint declaration on the EU's legislative priorities for 2018-2019, on behalf of the citizens they serve and in the interest of Europe and the wider world.

Our research is presented for both complete and selective reading: the various chapters can be read separately and in any order. To go deeper, hyperlinks lead to more specific websites and pages. A section on main references gathers useful sources, including the previous editions of this bi-annual publication, which tell the story from 2014 onwards. Important issues which do not necessarily fall under one of the ten priorities – such as Brexit or other challenges for the European Union for 2018 – are extensively covered in other EPRS publications available on the EP Think Tank website. Detailed EPRS material on specific legislative files referred to below can also be found on the EP Think Tank. In addition, the latest state of play on individual initiatives coming under the ten priorities can be monitored via the regularly updated Legislative Train Schedule on the Parliament's website.

2. Main developments in the implementation of the ten political guidelines

Priority 1: A new boost for jobs, growth and investment

The first priority of the 2014 political guidelines, concerning 'jobs, growth and investment', encompassed three main elements: the European Semester, the investment plan for Europe, and the circular economy package. Beyond completing and delivering its priorities during this mandate, the European Commission also adopted, in May 2018, the proposal for the 2021-2027 Multiannual Financial Framework (MFF), which it has included under this priority (see section 3 below).

The European Semester

The European Semester is the framework for economic and fiscal policy coordination within the EU. According to Amy Verdun and Jonathan Zeitlin, 'its procedures build on, but also reformulate, the EU's pre-existing processes of fiscal, economic, employment and social policy co-ordination, as these had developed during the 1990s and 2000s, including the Stability and Growth Pact (SGP), the broad economic policy guidelines (BEPGs), the European employment strategy (EES), the Lisbon strategy and the open method of co-ordination (OMC)'. Created in 2010 in the wake of the financial and sovereign debt crises and revamped in 2015, it starts each November when the Commission sets the priorities for the year to come and ends in October of the following year, when Member States submit their draft budgetary plans. In this context, the European Commission:

1. adopted in November 2017 the annual growth survey 2018, the alert mechanism report 2018, a recommendation for a Council recommendation on the economic policy of the euro area, a draft joint employment report, a proposal for a Council decision on guidelines for the employment policies of the Member States, and a communication on the 2018 draft budgetary plans of the euro area;
2. adopted in February 2018 country reports, i.e. EU recommendations for individual Member States, the main elements of which are summarised in the communication on country reports; as well as in-depth reviews for the countries selected in the alert mechanism report;
3. examined, in April and May 2018, the Member States' National Reform Programmes and Stability/Convergence Programmes and assessed them;
4. following the assessment of the programmes, presented in May 2018 country-specific recommendations (CSRs) for each Member State, along with a communication on the CSRs.

The investment plan for Europe

The purpose of the European Commission's investment plan is to mobilise and support investment. This is achieved mainly through the European Fund for Strategic Investment (EFSI) proposed in January 2015, but also through initiatives such as the digital single market, the energy union and the capital markets union (see below priorities 2, 3 and 4).

Originally endowed with €16 billion in guarantees from the EU budget and €5 billion from the European Investment Bank (EIB), EFSI aims to encourage private investors to participate in new investment projects focused on developing infrastructure and innovation – managed by the EIB – and on providing support for small- and medium-sized enterprises (SMEs) – managed by the European Investment Fund (EIF). By taking on part of the risk through a first-loss liability, EFSI was meant to allow more than €315 billion of additional investment to be mobilised during a three-year investment period, thereby helping to create 2.1 million jobs. To that end, the EU budget included €2.7 billion in commitments for EFSI in 2017 and €2.038 billion in 2018.

As of June 2018, deals approved under EFSI amounted to €58.9 billion in financing and are expected to trigger €294.2 billion in investments in 28 Member States, mainly in the areas of SMEs, energy and research, development and innovation. These positive trends in investment, which were already visible in summer 2016 and are expected to add 0.7 % to the EU gross domestic product (GDP) by 2020, encouraged the Commission to adopt a proposal, in September 2016, to double the duration of the fund (until 2020) and increase its financial capacity to €500 billion of investments, by increasing the guarantees to €26 billion and the EIB contribution to €7.5 billion. On 12 December 2017, the European Parliament and the Council adopted the amended proposal and the final act was published in the Official Journal on 27 December 2017.

Another legislative proposal of interest in this context, also presented by the Commission in September 2016, aims to simplify the financial rules applicable to the general budget of the EU (often referred to as the 'Omnibus proposal'). Among other things, the proposal aims to facilitate the combination of European Structural and Investment Funds (ESIF) funding with financial instruments and the European Fund for Strategic Investments (EFSI). The European Parliament adopted its position on 5 July 2018. Shortly after, (on 16 July), the Council adopted the text, and the final act was published in the Official Journal on 30 July 2018.

Towards a circular economy

The package on the circular economy is meant to contribute to enhancing EU industry sustainability and competitiveness, to fostering sustainable economic growth, and to generating new jobs. This would be achieved by preserving resources (and thus saving costs), by helping businesses to make and export clean products and services around the globe, and by creating local low- and high-skilled jobs, as well as opportunities for social integration and cohesion. It is estimated that the transition would increase GDP by one to seven percentage points by 2030 and also have an overall positive impact on employment, although jobs in specific sectors could be threatened. Over €650 million in funding was planned for the package under Horizon 2020, as well as €5.5 billion under the structural funds. The original package was composed of proposals for four directives on waste, on packaging waste, on landfill of waste and on electrical and electronic waste, and for one regulation on marked fertilising products. These proposals – apart from the last, which is still under discussion – were adopted by the co-legislators and published in the Official Journal in June 2018.

In January 2017, the Commission also published a report on the implementation of the circular economy action plan and a communication on the role of waste-to-energy in the circular economy. The report summarised a number of important initiatives undertaken by the Commission in the context of the circular economy action plan. It also announced key initiatives adopted by the Commission in 2017, including a plastics strategy (postponed to January 2018), and a legislative proposal on minimum quality requirements to promote the safe reuse of treated waste water. In January 2018, the Commission indeed adopted a new circular economy package. This comprised:

> an EU strategy for plastics in the circular economy aiming 'to transform the way plastics and plastics products are designed, produced, used and recycled' by 2030. The strategy also highlights the need for specific measures to reduce the impact of single-use plastics, particularly in seas and oceans. In this context, in May 2018 the Commission came forward with a proposal for a directive on the reduction of the impact of certain plastic products on the environment;

> a proposal for a directive on port reception facilities for the delivery of waste from ships;

> a communication on options to address the interface between chemical, product and waste legislation that assesses how the rules on waste, products and chemicals relate to each other;

> a monitoring framework on progress towards a circular economy at EU and national level;

> a report on critical raw materials and the circular economy that highlighted the potential to make the use of the 27 critical materials in the EU economy more circular; and

> a report on the impact of the use of oxo-degradable plastic, including oxo-degradable plastic carrier bags, on the environment.
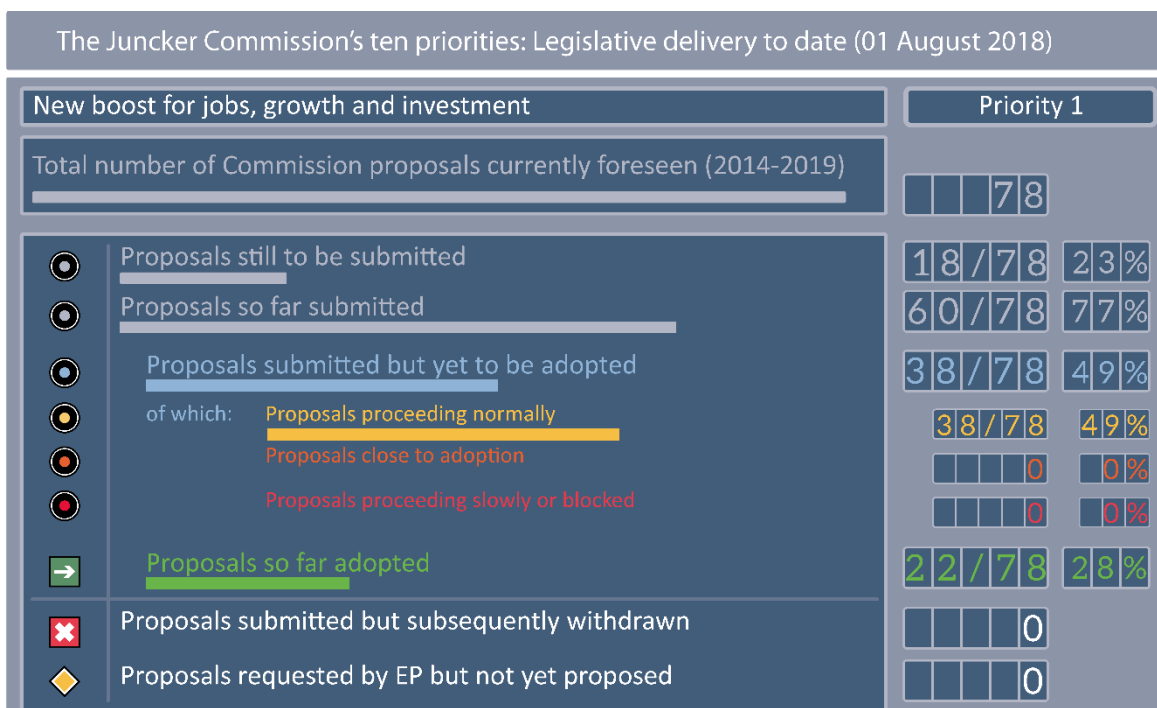
Both proposed directives in this package are currently before the Parliament and the Council.

The new multiannual financial framework (MFF) 2021-2027

The 2021-2027 MFF is designed for a European Union of 27 Members States (as it would cover the period after the UK has left the EU), with a long-term perspective, and a budget equivalent to 1.11 % of the EU's gross national income (GNI). While some current levels of fundings would increase in some priority areas (such as research and innovation, the digital economy, young people, border management, security and defence), they would reduce in others (such as agricultural policy and cohesion policy). European added value would be a guiding principle, as well as linking the budget to the respect of the rule of law (see section 3 below).

Other measures

The European Commission aims to complement its existing initiatives on youth, skills and jobs. This is why, it adopted a proposal in May 2017 for a regulation laying down the legal framework of a 'European solidarity corps'. The proposal sets out the objectives, activities and criteria for participation by individuals and organisations; provisions for the monitoring, reporting and evaluation of the performance of the European Solidarity Corps; as well as a management, audit and control system. The Commission defines the budgetary envelope (€341.5 million for the 2018-2020 period), seeking to enable 100 000 young Europeans to take part by the end of 2020. Most of the amount (€294.2 million) concerns redeployed funds from Erasmus+ and other programmes, while the rest is expected to come from contributions from the European Social Fund, the Union civil protection mechanism, the LIFE programme and the European Agricultural Fund for Rural Development. The proposal is currently under interinstitutional negotiations, with a vote scheduled for the plenary in September 2018.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)		
New boost for jobs, growth and investment		Priority 1
Total number of Commission proposals currently foreseen (2014-2019)		78
◉ Proposals still to be submitted		18/78 · 23%
◉ Proposals so far submitted		60/78 · 77%
◉ Proposals submitted but yet to be adopted		38/78 · 49%
◉ of which: Proposals proceeding normally		38/78 · 49%
◉ Proposals close to adoption		0 · 0%
◉ Proposals proceeding slowly or blocked		0 · 0%
→ Proposals so far adopted		22/78 · 28%
✖ Proposals submitted but subsequently withdrawn		0
◆ Proposals requested by EP but not yet proposed		0

Priority 2: A connected digital single market

An effective digital economy can provide impetus for European markets and open up prospects for new employment. To succeed in this endeavour, Europe needs to overcome legislative fragmentation, offer EU consumers an improved product by removing online barriers, and help businesses expand their online sales. Success depends on the creation of a fully integrated digital single market (DSM), on the basis of the national markets of the Member States.

EU policy in this area is structured around three main areas developed in detail below. The Juncker Commission started its work on the digital economy with the adoption of the DSM strategy in May 2015. In the mid-term review of the DSM strategy, published in May 2017, the Commission announced that it had put forward 35 legislative proposals and policy initiatives, and that the focus would shift to obtaining the Parliament and Council's political agreement on them. Furthermore, all the initiatives from the Commission 2018 work programme have now been tabled. In order to advance Europe's digital transformation to the benefit of citizens and businesses, the Commission has proposed the creation, as a part of the Multiannual Financial Framework (MFF) proposal for 2021-2027, of a new funding programme entitled Digital Europe, with €9.2 billion to be allocated over this period (see section 3 below).

Improving access to digital goods and services for consumers and businesses

The co-legislators have focused on facilitating access to digital goods and services across EU borders. In June 2017, they adopted the regulation on cross-border portability, which enables consumers to access their online subscriptions for content services when they travel across the EU and are temporarily outside their Member State of residence. Furthermore, in order to tackle some unjustified geo-blocking practices, they adopted, in February 2018, a regulation preventing traders from discriminating between online customers on the basis of their nationality, place of residence, or place of establishment within the EU.

The European Commission also adopted, in September 2016, a comprehensive legislative package to further harmonise EU copyright rules and adapt them to the digital environment. In July 2017, the European Parliament and the Council adopted the first two pieces of legislation: a regulation and a directive implementing in the EU the provisions of the Marrakesh Treaty aiming to facilitate access to published works for people who are blind, visually impaired or print disabled. In parallel, the Parliament and the Council are conducting lengthy negotiations on the Commission's proposal for a new regulation laying down rules for online transmissions and retransmissions of television and radio programmes and on the proposal for a new directive on copyright in the DSM.

To improve consumer protection when shopping online, and to help EU businesses boost their online sales, the Commission adopted two proposals in December 2015: a first proposal on the supply of digital content, and a second proposal on the online sale of goods. The latter has been amended by the Commission, after initial talks with the European Parliament and the Council, in order also to cover face-to-face sales. Both texts tackle the fragmentation of the current DSM legal framework and are being discussed in trilogue negotiations.

In order to better address cross-border infringements and increase consumer trust in e-commerce, the co-legislators adopted in December 2017 a regulation reforming consumer protection cooperation, which aims to increase the powers of national authorities to better reinforce consumer rights. In April 2018, they also adopted a regulation on cross-border delivery of parcel services, to improve price clarity and improve regulatory oversight in the sector. In April 2018, the Commission

proposed a new deal for consumers package in order to increase transparency in online market places and on search results on online platforms.

In addition, the new simplified VAT rules to support e-commerce and online businesses were adopted in December 2017, which will streamline tax procedures for distance sales. In order to ensure a level playing field for businesses, the Commission also proposed the fair taxation of the digital economy package, consisting of interim and long-term reforms of corporate taxation. This is in line with Parliament's efforts to increase the digital dimension of the corporate tax regime.

Creating growth-conducive conditions and a level playing field for digital networks and innovative services

Data protection and privacy rights play an important role in this policy area. Comprehensive rules were adopted in 2016 and became fully applicable in May 2018 (see priority 7 below). To complement these rules, the Commission adopted in January 2017 a proposal for a regulation to update the e-Privacy Directive. The objectives of the review include enhancing security and confidentiality of e-communications also by covering 'over the top' services (e.g. Skype or Whatsapp), clarifying rules on tracking tools such as cookies, and achieving greater harmonisation between Member States. While the European Parliament adopted its first reading position in October 2017, discussions are still ongoing in the Council, to find a balance between privacy protection and business models (in particular on the legitimate grounds for processing private data). Although trilogues have not yet started, the regulation is expected to be adopted by the end of 2018.

In April 2017, the co-legislators adopted a decision for a long-term strategy for the use of the 470-790 MHz frequency band, reallocating bandwidth to mobile internet services, rather than television broadcasting. Under the agreement, EU countries will reassign this high-quality frequency band to wireless broadband services by 30 June 2020.

To improve connectivity in the EU, the Commission proposed a set of measures under the gigabit society initiative, in September 2016. These include a proposal for the overhaul of telecom rules under the new European electronic communications code and a proposal for a regulation on the Body of European Regulators of Electronic Communications (BEREC), on both of which the co-legislators agreed in June 2018; a proposal for a regulation on the promotion of internet connectivity in local communities and public spaces (WIFI4EU) – which was adopted in September 2017 – as well as a communication on a 5G action plan. The regulation on the rules for wholesale roaming markets was adopted in May 2017. As a result, since 15 June 2017, when travelling in the EU, consumers have been able to 'roam like at home'.

Further developments include the review of the 2010 Audiovisual Media Services Directive. The revised directive, aiming to introduce more flexible, safe and future-proof rules, was agreed by the co-legislators in June 2018.

In September 2017, the Commission adopted a cybersecurity package, which would support the development of technology and industrial capabilities in cybersecurity, strengthen the ENISA agency, as well as create an EU-wide certification scheme for secure products and services.

Online platforms (e.g. search engines, social media, e-commerce platforms, app stores, price comparison websites) are increasingly playing a central role in the social and economic lives of Europeans. The Commission has launched a series of initiatives to tackle the new policy and the regulatory challenges posed by online platforms. The Commission adopted a recommendation on illegal content online in March 2018 and a communication on tackling online disinformation

(i.e. 'fake news') in April 2018. Furthermore, the Commission presented a proposal for a regulation on promoting fairness and transparency for business users of online intermediation services in May 2018.
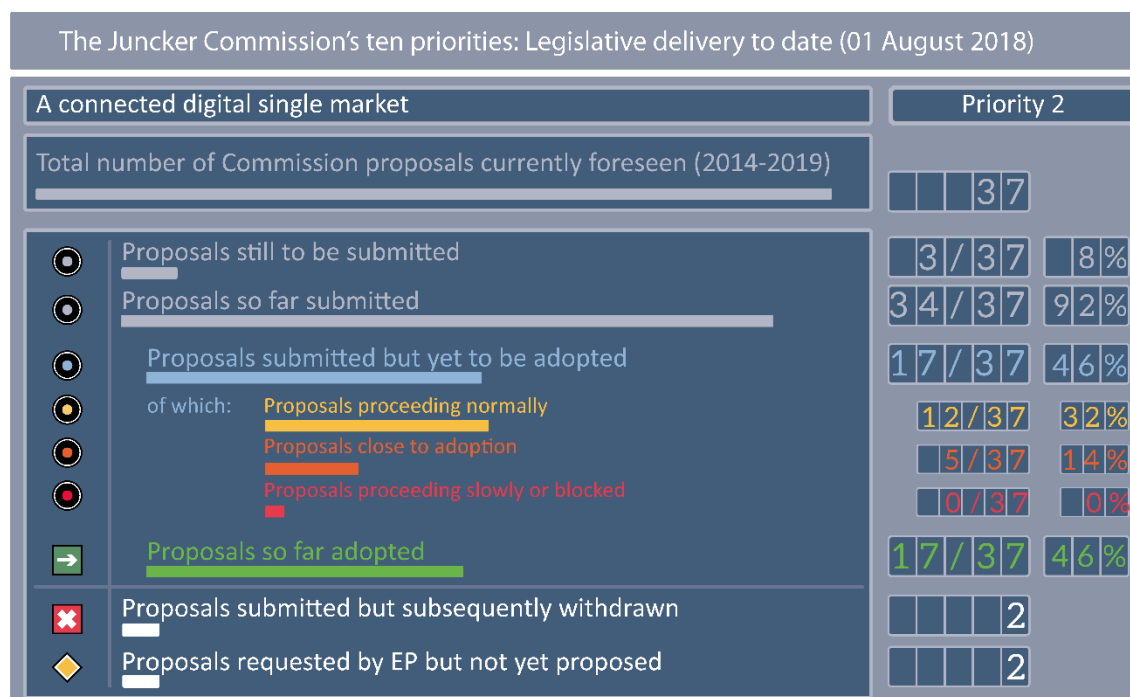
Maximising the growth potential of the digital economy

In April 2016, the European Commission adopted a set of communications on digitising European industry, the EU e-government action plan for 2016-2020, a new European interoperability framework, and the priorities of ICT standardisation. These strategies intend to support initiatives for the digital transformation of industry and related services, boost investment through strategic partnerships and networks, accelerate the development of common standards in priority areas (such as 5G communication networks), and modernise public services. Tools used include digital innovation hubs and contractual public-private partnerships.

To build a competitive data and knowledge economy in Europe, the Commission adopted the European cloud initiative, which led to further projects such as the European open science cloud for researchers and a European high performance computing joint undertaking for creating world-class supercomputing capability in Europe. Further actions, which would allow better use and circulation of data across borders, include new proposed legislation on the free flow of non-personal data (on which the co-legislators reached an agreement in June 2018), and on re-use of public sector information.

The Commission also proposed to create a single digital gateway – an access point for businesses and citizens to information, online administrative procedures and assistance services.

Furthermore, the European Commission adopted in May 2018 a communication on artificial intelligence (AI) for Europe, laying down the European approach to make the most out of the opportunities offered by AI and address the new challenges it brings.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)		
A connected digital single market		Priority 2
Total number of Commission proposals currently foreseen (2014-2019)		37
◉ Proposals still to be submitted		3 / 37 8 %
◉ Proposals so far submitted		34 / 37 92 %
◉ Proposals submitted but yet to be adopted		17 / 37 46 %
◉ of which: Proposals proceeding normally		12 / 37 32 %
◉ Proposals close to adoption		5 / 37 14 %
◉ Proposals proceeding slowly or blocked		0 / 37 0 %
→ Proposals so far adopted		17 / 37 46 %
✖ Proposals submitted but subsequently withdrawn		2
◆ Proposals requested by EP but not yet proposed		2

Priority 3: A resilient energy union with a forward-looking climate change policy

In line with the EU's commitment to provide its citizens and businesses with secure and affordable energy, while also addressing the causes of climate change, the European Commission launched its European energy union strategy in February 2015, which was endorsed by the European Council in March 2015. The strategy builds on the 2030 policy framework for climate change and energy, which laid down three key targets for the EU by 2030: a minimum 40 % cut in greenhouse gas emissions compared to 1990; at least a 27 % market share for renewable energy; and an improvement in energy efficiency of not less than 27 %. The energy union strategy has five inter-related dimensions covered in the sections below. To address this priority, the European Commission adopted a series of packages:

> A summer energy package of legislative proposals on energy efficiency labelling and emissions trading, and communications on energy markets and consumers, in 2015.
> A sustainable energy security package, in February 2016.
> A package focused on addressing climate issues falling outside the emissions trading system (ETS) sector, in July 2016.
> A 'clean energy for all Europeans' package, in November 2016. It includes, amongst others, a proposal for a regulation on the governance of the energy union, which aims to enhance the transparency and coordination of energy policies between Member States. This regulation, on which a trilogue agreement was reached in June 2018, obliges Member States to prepare national energy and climate plans, as well as long-term low-emission strategies, and to produce regular progress reports.
> In November 2017, the Commission adopted the clean mobility package, which includes proposals to foster low-carbon solutions in the transport sector, followed in May 2018 by a proposal for reducing CO_2 emissions of heavy-duty vehicles.

The third state of the energy union report, published in November 2017, notes that almost all Commission initiatives had been delivered, highlights the importance of engagement with Member States and society as a whole, and urges Member States to deliver their post-2020 draft integrated national energy and climate plans by early 2018. The Commission's 2018 work programme announced a communication on the future of EU energy and climate policies, covering also the Euratom Treaty, initially for mid-2018, later postponed to 'before the end of 2018'.

International climate change agreements

The European Union played a leading role in the negotiations leading to the Paris Agreement, a global climate agreement concluded in December 2015 at the UN Climate Change Conference (COP21). A European Parliament delegation took part in these negotiations. The Paris Agreement entered into force in November 2016.

In 2016, international agreements to reduce greenhouse gas emissions were also concluded in the International Civil Aviation Organization (ICAO) for the aviation sector, and under the Montreal Protocol for fluorinated greenhouse gases. In April 2018, the International Maritime Organization (IMO) adopted an initial strategy on the reduction of greenhouse gas emissions from ships.

Energy security, solidarity and trust

To ensure that intergovernmental agreements (IGA) with non-EU countries in the field of energy are compatible with EU law, the decision on IGAs, requiring Member States to submit draft IGAs for an ex-ante check, came into force in May 2017. In November 2017, the Commission adopted a proposal to amend the Gas Directive to extend common EU gas rules to import pipelines. With respect to energy security, the regulation on the security of gas supply was adopted by Parliament and Council

in October 2017 and the legislative proposal on risk preparedness in the electricity sector, adopted by the Commission in November 2016, is currently in trilogue negotiations.

Fully integrated European energy market

In July 2015, the Commission adopted an initial set of proposals to deliver a new deal for energy consumers. The 2016 regulation on energy price statistics aims at improving the collection and comparability of gas and electricity price statistics in Member States.

A European energy market needs physical interconnections to transport gas and electricity between Member States. In February 2015, the Commission issued a communication on electricity interconnections describing measures needed to reach the target of 10 % electricity interconnection by 2020. The third list of projects of common interest (PCI) – key energy infrastructure projects that receive financial support from the Connecting Europe Facility (CEF) and the European Fund for Strategic Investment (EFSI) – was adopted in November 2017. A communication on strengthening Europe's energy networks calls on all stakeholders to maintain commitment and accelerate the building of key energy networks.

The Commission adopted legislative proposals for a new electricity market design in November 2016, in the form of a proposal for a directive and a proposal for a regulation, (currently in trilogue negotiations) as well as a proposal for a recast regulation on the role of the European Agency for the Cooperation of Energy Regulators (ACER). This was accompanied by a report on the Commission's sector inquiry on capacity mechanisms.

Energy efficiency contributing to moderation of demand

The European Commission promotes 'energy efficiency first' as a principle, meaning that energy efficiency should be given consideration before taking steps to expand production, import or transport capacity. To make energy labels easier for consumers to understand, a regulation on energy efficiency labelling was adopted in June 2017. To target the energy efficiency potential in buildings, the revision of the Energy Performance of Buildings Directive was adopted in May 2018. The European Commission also adopted a proposal to revise the general instrument, the Energy Efficiency Directive, and in June 2018, the co-legislators reached a provisional agreement on that revision, raising the target for energy efficiency improvements to 32.5 % by 2030. At the same time, the European Commission adopted an ecodesign working plan and implementing legislation on verification procedures, eco-design requirements for air heating and cooling products, and guidelines on industry self-regulation.

Decarbonising the economy

This priority is focused on the transition towards a low-carbon economy to meet the EU's climate targets. A revised EU Emissions Trading System (ETS) Directive in line with the EU's 2030 greenhouse gas reduction target was adopted in March 2018. Regulations on effort sharing for greenhouse gas reduction in the sectors outside the ETS, and on new rules for accounting for and reducing greenhouse gas emissions from land use and forestry were adopted in May 2018. In June 2018, the co-legislators reached a provisional agreement on revising of the Renewable Energy Directive, increasing the 2030 target for renewable energy market share to 32 %. The February 2017 proposal for a regulation concerning post-2020 emissions trading for the aviation sector, taking account of the development of a global market-based measure in the ICAO, was agreed in December 2017.

The Commission's November 2017 progress report on climate action, entitled 'Two years after Paris', concludes that the EU has succeeded in decoupling its economic growth from its emissions.

In July 2018, the Commission launched a public consultation on the strategy for long-term EU greenhouse gas emissions reduction.
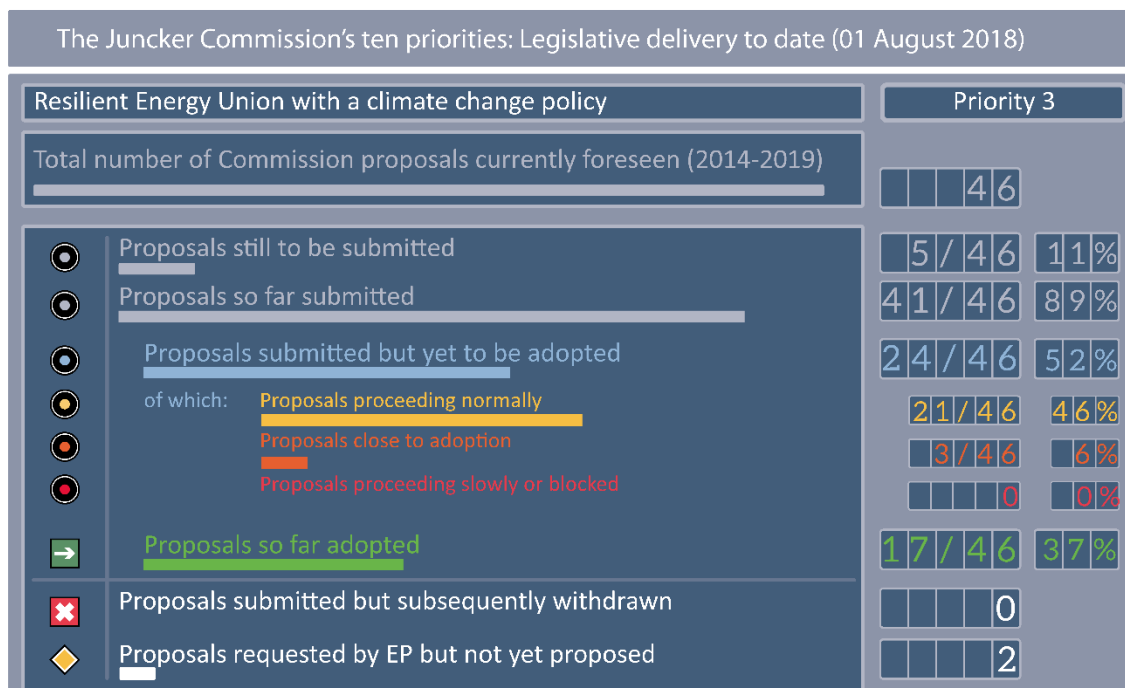
To decarbonise the transport sector, the Commission presented a European strategy for low emission mobility in July 2016 and a European strategy on cooperative, intelligent transport systems in November 2016. A regulation on monitoring and reporting of CO_2 emissions from heavy-duty vehicles, proposed in May 2017 as part of its 'Europe on the move' package, entered into force in July 2018. Legislative proposals for post-2020 CO_2 targets for cars and vans and for promoting public procurement of clean vehicles were adopted in November 2017, along with an action plan for alternative fuels infrastructures. The Commission proposed the first-ever CO_2 targets for heavy-duty vehicles in May 2018.

Research, innovation and competitiveness

The Commission revised the strategic energy technology (SET) plan to promote research and innovation in September 2015. In November 2016, it presented a communication on accelerating clean energy innovation. As part of its renewed EU industrial policy strategy, the Commission launched a battery initiative in October 2017 to establish a full value chain of batteries in Europe.

European Parliament position

The Parliament set out its views on the energy union in its resolution of December 2015, reiterating its calls for more ambitious targets for energy efficiency and renewable energy. It adopted resolutions on delivering a new deal for energy consumers in May 2016; on the renewable energy progress report in June 2016; on EU strategy on heating and cooling in September 2016; and on an EU strategy for liquefied natural gas and gas storage in October 2016. In addition, the Parliament set out its positions ahead of certain major legislative proposals through own-initiative reports: on energy efficiency, in June 2016; and energy market design, in September 2016. A parliamentary delegation participated in the UN climate negotiations in Lima, Paris, Marrakesh and Bonn. In October 2017, the Parliament adopted a resolution on COP23, emphasising the need for ambitious climate action and calling for a mid-century zero-emission strategy for the EU.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)	
Resilient Energy Union with a climate change policy	**Priority 3**
Total number of Commission proposals currently foreseen (2014-2019)	46
⦿ Proposals still to be submitted	5/46 11%
⦿ Proposals so far submitted	41/46 89%
⦿ Proposals submitted but yet to be adopted	24/46 52%
⦿ of which: Proposals proceeding normally	21/46 46%
⦿ Proposals close to adoption	3/46 6%
⦿ Proposals proceeding slowly or blocked	0 0%
→ Proposals so far adopted	17/46 37%
✖ Proposals submitted but subsequently withdrawn	0
◆ Proposals requested by EP but not yet proposed	2

Priority 4: A deeper and fairer internal market with a strengthened industrial base

Completing the EU single market – supporting innovation, digitisation and industrial transformation, embracing the challenges of artificial intelligence and the need for clean and sustainable energy supply, while focusing on people – requires a multi-faceted approach.

Capital markets union

Through the establishment of a capital markets union (CMU) by 2019, the Commission aims to diversify and improve access to funding for enterprises, especially small- and medium-sized enterprises (SMEs), and to increase the European economy's shock-absorption capacity. European businesses are still heavily dependent on banks for their funding, and much less so on capital markets. More diversified sources could instead help to reduce the cost of financing.

The capital markets union complements the banking union in which risk-sharing and risk-reduction should go hand in hand. For a deeper financial integration and a more stable financial system, a communication from the Commission in October 2017 called for the completion of all parts of the banking union. On the one hand, in relation to risk-reduction, the Commission called for a rapid agreement from the co-legislators on its comprehensive proposal of November 2016. While recognising the current trend of declining levels of non-performing loans (NPLs), the Commission also suggested new measures to reduce NPLs and to help banks diversify their investments in sovereign bonds. On the other hand, the Commission came forward with proposals on the risk-sharing side, such as the proposal for a European deposit insurance scheme (EDIS) that gained new impetus in the October 2017 communication (see also priority 5). The latter also took stock of progress reached in completing a common fiscal backstop to enhance the financial capacity of the Single Resolution Fund (SRF). While the Council agreed on a general approach on the banking reform in May, the Parliament's Economic and Monetary Affairs Committee voted on related first reading reports in June 2018. Trilogues started in early July.

The March 2018 communication on completing the CMU by 2019 contains a new package of proposals – in line with the mid-term review of the capital market union action plan – to boost the cross-border market for investment funds, promote the EU market for covered bonds as a source of long-term finance, and ensure greater certainty for investors when dealing in cross-border transactions of securities and claims. Complementing the proposals put forward in autumn 2017, two specific action plans were adopted on financing sustainable growth and FinTech. The first is based on the recommendations of the high-level group of sustainable finance and contributes to the efforts to connect finance with the specific needs of the European economy to the benefit of the planet and our society. The second one sets out 19 steps to enable innovative business models to scale up, support the uptake of new technologies, increase cybersecurity and the integrity of the financial system with the aim of supporting consumers, investors, banks and new market players.

Tax measures

To ensure a better business environment and sustainable revenues, everybody needs to contribute their fair share. Addressing corporate tax evasion and tax fraud is a necessity and a major element of good governance of tax systems. As regards transparency, four revisions to the Directive on Administrative Cooperation (DAC) were adopted during the first two years of the Commission's mandate. In May 2018, the Council adopted a fifth amendment to the DAC aimed at preventing aggressive cross-border tax planning. These require intermediaries such as tax advisors, accountants, and lawyers who design and/or promote tax planning schemes to report schemes that

are considered potentially aggressive. Member States will be required to automatically exchange the information they receive through a centralised database. The Council also adopted conclusions on the EU list of non-cooperative jurisdictions for tax purposes. The list includes non-EU countries or territories that failed to make sufficient commitments in response to EU concerns. Separately from the list, a document features the jurisdictions that responded in a sufficient manner.

As for the tax base, two 2016 proposals on the re-launch of the common consolidated corporate tax base (CCCTB), both under the consultation procedure, are before the Council for adoption (common corporate tax base (CCTB) and common consolidated corporate tax base proposals).

When it comes to the value added tax (VAT) system, the Commission adopted the action plan on VAT: towards a single EU VAT area in April 2016. At the end of that year, the Commission launched its plans for a major VAT reform that should help to overcome VAT fraud and create a simpler and more robust system for companies to use and at the same time draw all the benefits from the single market in a global context. The reform envisages a future VAT system where VAT would be charged on sales that are made across borders to another country in the EU. Since January 2018, several measures were taken to deliver on the VAT action plan. In June 2018, the Council agreed on modifications to the VAT system to boost administrative cooperation, and hence prevent VAT fraud. It also adopted a directive on the VAT standard rate. To further adapt VAT systems to the digital economy, in March 2018 the European Commission proposed rules (including two legislative proposals, a recommendation and a communication) to guarantee that digital business activities are taxed in a fair and growth-friendly way in the EU. This package is currently before the Council.

Upgrading the single market
A number of obstacles continue to hamper the single market, including with regard to enabling citizens to live and work wherever they like across the EU. A January 2017 communication provides guidance for national reforms in regulation of professions, with the aim of opening up the services markets. Three legislative proposals on a new European services e-card, on proportionality assessment of national rules on professional services and on improved notification of draft national laws on services should further contribute to this objective. In May 2017, the Commission presented its compliance package, with proposals for a single digital gateway, a single market information tool (SMIT), and an action plan on the reinforcement of Solvit. These should provide access to high quality information, online administrative procedures, and assistance services, through a single digital entry point. These files are all still in different stages of institutional negotiations.

The 2017 renewed EU industrial policy strategy offers a holistic approach to industry, combining existing and new horizontal and sector-specific initiatives. Most of its actions have since been tabled by the Commission. The high-level industrial roundtable 'Industry 2030', launched in 2018, is an important advisory instrument for the implementation of the Commission's policy.

Essential initiatives were put forward in January 2018 to move towards a more circular economy. The four proposals included a strategy on plastics and measures to improve the production of renewable biological resources and their conversion into bio-based products and bio-energy, as well as a monitoring framework on the circular economy and a new proposal for a directive on port reception facilities of waste (see also priority 1).

To address skills mismatches as well as short- and medium-term skills needs, the blueprint for sectoral cooperation on skills initiative was established as part of the new skills agenda in 2016. In the autumn of 2017, the sectoral cooperation was extended towards key industry sectors, such as construction, steel, paper, green technologies and renewable energies, manufacturing and maritime shipping.
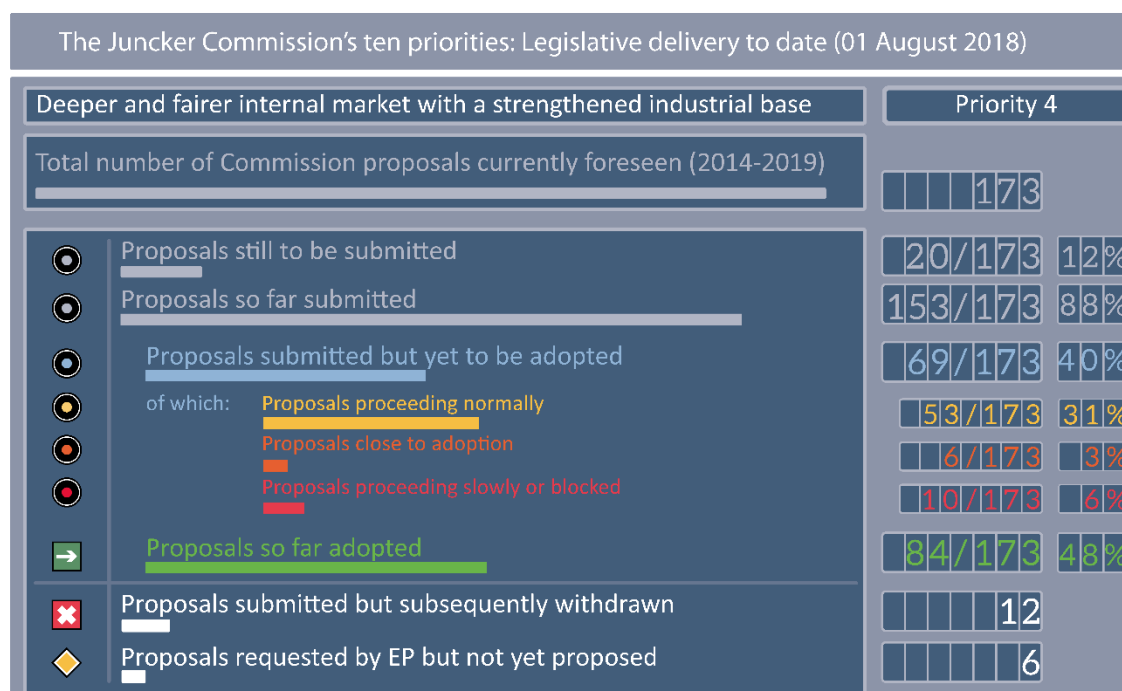
To further protect creators and inventors across the EU, the autumn 2017 package on intellectual property rights put great emphasis on guidance to Member States for the more homogenous implementation of the measures.

Finally, the Commission outlined its approach to artificial intelligence. A high-level expert group on artificial intelligence, consisting of academics, civil society and industry representatives, was established in June 2018 to support the implementation of the Commission's strategy (see also priority 2).

Labour mobility package
Enabling labour mobility to counterbalance skills mismatches is imperative to reach the full potential of the single market. Labour mobility needs to go hand in hand with fair labour markets and equal social rights for all workers. The labour mobility package comprises: (i) supporting labour mobility and tackling abuse by means of better social security system coordination; (ii) the targeted review of the Posting of Workers Directive; and (iii) enhanced European employment services (EURES) that are intended to facilitate the freedom of movement of workers within the EU. In June 2018, the Council reached a general approach on social security coordination and, together with the Parliament, adopted the Posting of Workers Directive.

The joint proclamation on the European Pillar of Social Rights signed by the Commission, Council and Parliament should serve as a compass for policies on updating the labour market and the welfare states. Due to limited EU competence in the social field, implementation of the Social Pillar is for the Member States, in cooperation with social partners and with the support of the EU. A March 2018 communication and a staff working document by the Commission took stock of the implementation and outlined possible further developments. In addition, several legislative initiatives have been launched in relation to the implementation of the Social Pillar, among which the establishment of a European Labour Authority and a new proposal for transparent and predictable working conditions are important for improving working conditions. Moreover, the Commission has put forward a proposal for a Council recommendation on social protection for all and in June 2018 the Council adopted a general approach on the work-life balance directive.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

Deeper and fairer internal market with a strengthened industrial base	Priority 4
Total number of Commission proposals currently foreseen (2014-2019)	173
Proposals still to be submitted	20/173 12%
Proposals so far submitted	153/173 88%
Proposals submitted but yet to be adopted	69/173 40%
of which: Proposals proceeding normally	53/173 31%
Proposals close to adoption	6/173 3%
Proposals proceeding slowly or blocked	10/173 6%
Proposals so far adopted	84/173 48%
Proposals submitted but subsequently withdrawn	12
Proposals requested by EP but not yet proposed	6

Priority 5: A deeper and fairer economic and monetary union

This fifth priority reflects the understanding that, through the completion of EU economic and monetary union (EMU), Europe can build a stronger and more efficient European economy, prepare for the global challenges that lie ahead, and provide conditions for Member States to prosper.

Completion of economic and monetary union

In line with the 2014 political guidelines, European Commission President Jean-Claude Juncker, in close cooperation with the then presidents of, respectively, the European Council, Donald Tusk, the Eurogroup, Jeroen Dijsselbloem, the European Central Bank, Mario Draghi, and the European Parliament, Martin Schulz, prepared a report on completing Europe's economic and monetary union (the 'Five Presidents' Report'). Presented on 22 June 2015, it reflects the personal deliberations and discussions of the five presidents, provides ideas on to how to deepen EMU, and advises on possible stages for implementation, beginning from July 2015. Stage 1, entitled 'deepening by doing' (1 July 2015-30 June 2017), prescribes building on existing instruments and treaties to boost competitiveness and structural convergence, complete the financial union, achieve responsible fiscal policies at national and euro area level, and enhance democratic accountability. Stage 2, 'completing EMU', proposes far-reaching measures to make the convergence process more binding, in particular through a set of commonly agreed benchmarks that could be given a legal nature, with the final stage with a fully-fledged EMU to be reached at the latest by 2025.

The European Parliament's contributions were based on its past and current positions, in particular those set out in its resolution of June 2015 on 'review of the economic governance framework: stocktaking and challenges'. In this resolution, Parliament placed particular emphasis on the democratic legitimacy and accountability of the European Semester, and the proposal for a fiscal capacity within the euro area. The Parliament furthermore demanded that the European stability mechanism (ESM) and the fiscal compact (the fiscal part of the Treaty on Stability, Coordination and Governance, TSCG), 'be fully integrated into the Community framework', making it formally accountable to Parliament. The European Parliament monitors the process closely and, in February 2017, adopted resolutions first on a budgetary capacity for the euro area, second on improving the functioning of the European Union building on the potential of the Lisbon Treaty, and third on possible evolutions of and adjustments to the current institutional set-up of the European Union.

In October 2015, in line with the 'five Presidents' report' (Stage 1), the Commission presented specific steps to complete EMU. The texts contain a recommendation for a Council recommendation on a euro area system of national competitiveness authorities and a European Commission decision establishing an independent advisory European fiscal board. This board is intended to focus on 'the horizontal consistency of the decisions and implementation of budgetary surveillance', and advise on the 'appropriate fiscal stance for the euro area'. Moreover, the Commission set out a roadmap towards a more efficient external representation of the EMU in relation to multilateral financial institutions such as the International Monetary Fund (IMF), while also reinforcing democratic accountability and legitimacy before the European Parliament. As to economic governance, the Commission 'revamped' the European Semester process as of 2016-2017, by strengthening democratic accountability and addressing EMU issues prior to country-specific recommendations.

On 24 November 2015, the European Commission proposed a regulation for a European deposit insurance scheme (EDIS), to create the 'third pillar' of banking union. The proposal aims to reduce the potential spill-over risk from local bank failures on financial stability in the economic and

monetary union as a whole. In view of the rather slow advancement of the dossier, the Commission advocated in a [communication](#) published on 11 October 2017, to introduce EDIS in two phases, linking the final introduction of EDIS to further risk reduction in the banking sector. The Commission already addressed some of these risks in its [banking reform package](#), adopted on 23 November 2016.

On 8 March 2016, the Commission launched a debate on a [European pillar of social rights](#) for the euro area. This initiative set out to identify common principles and benchmarks with a view to achieving greater convergence in employment and social performance over time. The [proclamation](#) of the pillar, which is a collection of 20 non-binding principles and rights supporting the renewal of current labour markets and welfare systems, was signed during the Gothenburg Social Summit of 17 November 2017 (see also priority 4).

Next steps

On 1 March 2017, the Commission published a [white paper](#) proposing five options for the future of Europe and launched a 'reflection paper' process. The [reflection paper](#) of 31 May 2017, on deepening of economic and monetary union, assesses progress made so far and outlines next steps in two phases: 2017 to 2019, and 2020 to 2025. It describes possible action to be taken by the next European elections in 2019 (mainly completing banking union and capital markets union), and delivers a 'series of options' for the following years. After 2020, the Commission envisages euro area options for a common issuance of debt ('European safe asset') as well as a macroeconomic stabilisation function, such as a 'European investment protection scheme'.

The Commission became more specific with President Juncker's [State of the Union speech](#) and the accompanying [letter of intent](#) of 13 September 2017, followed by the [Commission's 2018 work programme](#). The intergovernmental [Treaty on Stability, Governance and Growth](#) (TSCG) is to be integrated into EU law, and similarly the intergovernmental [European Stability Mechanism](#) (ESM) is to be transformed into a European Monetary Fund (EMF), also under EU law. The EU budget would be given a strong EMU dimension, with dedicated euro area budget lines that would offer (i) structural reforms assistance, (ii) a stabilisation function, (iii) a backstop for the banking union's single resolution mechanism, and (iv) EMU pre-accession assistance. By 2025, euro-area safe assets may be developed, and a European finance and economy minister post, possibly in the form of a Commission Vice-President, who could also chair the Eurogroup, may be created. Further steps to strengthen the banking union were also announced. The Commission is considering use of the Treaty's '[passerelle clause](#)' to move from unanimity to majority voting in fields such as taxation.
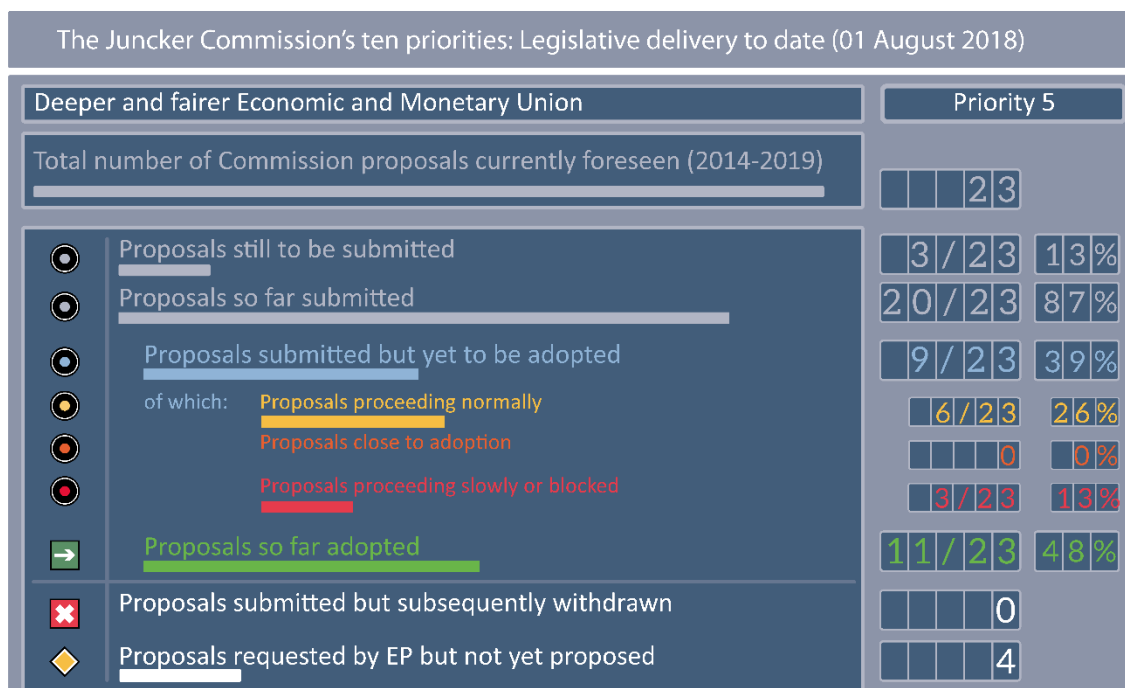
On 6 December 2017, the Commission set out a [roadmap](#) for deepening Europe's economic and monetary union, and adopted proposals on the [integration of the TSCG](#) into Community law, as well as the [transformation of the ESM into an EMF](#) anchored in the Union legal framework. A proposal was made to start a pilot phase using the performance reserve, in the current European Structural and Investment Funds (ESIF), to [support reforms](#) instead of specific projects, in order to mobilise funds in support of national reforms. Another proposal seeks to [increase the financial envelope](#) of the structural reforms support programme. The European Commission also adopted a communication on the possible creation of the above-mentioned [European Minister of Economy and Finance](#), and another on [new budgetary instruments](#) for a stable euro area. However, no proposal has yet been made for integrating the relevant parts of the [Euro Plus Pact](#) into EU law, as had been suggested in the 'five Presidents' report' and [requested](#) by Parliament.

Others have started adding their voices to the discussion, most notably French President Macron, mainly with his Sorbonne [speech](#) of September 2017. He advocates an approach that also comprises

strong intergovernmental elements, such as a separate parliament for the euro, as well as a dedicated budget for the euro area, to be created outside the existing EU budget. After several months of forming a new government, Chancellor Merkel finally joined the discussion, and both published a common position – the Meseberg declaration of 19 June 2018 – with the aim of giving guidance in the discussion. A euro area budget would be created, and economic stabilisation would be performed through a European unemployment stabilisation fund, as well as through the existing precautionary instruments of the ESM, i.e. through a credit line involving conditionality. The ESM would remain intergovernmental, carry out new tasks, such as serving as a backstop to the single resolution mechanism, and assume a role in fiscal surveillance.

However, under the leadership of the Netherlands, a growing number of countries strongly oppose plans for a specific euro-area budget. The Eurogroup meeting of 21 June 2018, where ideas on the future of EMU were discussed, showed a profound lack of consensus about the nature and aims of EMU, and thus concerning the instruments it should be equipped with. That absence of consensus casts a shadow on many of the Commission's proposals, not only those concerning new funds, but also those involving possible risk-sharing, such as with EDIS, or the creation of sovereign bond backed securities (SBBS). Much of the discussion centres on choosing between better enforcement of existing rules vs. adding new instruments, as well as the link between, or the sequencing of, the reduction of liabilities on one hand and a possible mutualisation of risk on the other. Progress on many of the Commission's EMU proposals is now either extremely slow or even non-existent. In addition, there is an unwillingness by Member States to provide the Commission with new prerogatives.

Important decisions on the future of Europe, including in the field of EMU, are scheduled to be taken at the meeting of Leaders in Sibiu on 9 May 2019, which is to be preceded by exhaustive preparatory work. Concerning EMU reforms, a string of European Council meetings failed so far to show palpable progress and the same is true for Eurogroup meetings. The Euro Summit of 29 June 2018, which was meant to be a key step in this process, resulted only in a decision in principle to give the ESM a backstop function for the single resolution mechanism (SRM). All other points were postponed to a December 2018 European Council meeting.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)	
Deeper and fairer Economic and Monetary Union	Priority 5
Total number of Commission proposals currently foreseen (2014-2019)	23
⊙ Proposals still to be submitted	3 / 23 · 13%
⊙ Proposals so far submitted	20 / 23 · 87%
⊙ Proposals submitted but yet to be adopted	9 / 23 · 39%
⊙ of which: Proposals proceeding normally	6 / 23 · 26%
⊙ Proposals close to adoption	0 · 0%
⊙ Proposals proceeding slowly or blocked	3 / 23 · 13%
→ Proposals so far adopted	11 / 23 · 48%
✖ Proposals submitted but subsequently withdrawn	0
◆ Proposals requested by EP but not yet proposed	4

Priority 6: A balanced and progressive trade policy to harness globalisation

A new narrative

President Juncker's sixth priority originally focused on the Transatlantic Trade and Investment Partnership (TTIP) with the United States. However, in the second half of 2017, the Commission decided to update this priority and make it geographically neutral to reflect political changes and shifting concerns on both sides of the Atlantic. The updated priority now encompasses the EU's entire trade policy and links it to the broader issue of globalisation.

Several documents reflect the Commission's rationale behind, and move towards, updating this priority. The first is the Commission's communication 'Trade for all – Towards a more responsible trade and investment policy', adopted in October 2015. This new trade strategy emphasises the importance of an effective and transparent trade policy that is based on values and helps shape globalisation. A second important document is the Commission's reflection paper of May 2017, in which the Commission discusses ways to respond to the opportunities and challenges of globalisation. This reflection paper was followed by a Commission communication in September 2017 that outlines a number of new initiatives in EU trade policy (the September 2017 trade package). The Commission's main work on trade negotiations, legislative files and implementation of its 'trade for all' strategy is set out below.

The state of play of trade negotiations

One of the Juncker Commission's biggest achievements so far has been the provisional entry into force of the EU-Canada Comprehensive Economic and Trade Agreement (CETA) in September 2017. The Commission is also working on finalising free trade agreements (FTAs) with Japan, Singapore and Vietnam. With Japan, the EU signed an Economic Partnership Agreement (EPA) on 17 July 2018. Separate negotiations on investment protection standards and dispute resolution are ongoing. With Singapore, the FTA was the subject of a Court of Justice of the EU (CJEU) opinion in May 2017, resulting in a decision to split the agreement into a Trade Agreement (TA) and an Investment Protection Agreement (IPA). The Commission presented both agreements to the Council in April 2018. The FTA with Vietnam, negotiations of which were initially concluded in 2015, has also been split into a TA and an IPA. The legal review of the TA and the talks on the IPA were finalised in June 2018 and the Commission hopes to present both agreements to the Council before the end of 2018.

As regards some of the key ongoing FTA negotiations, the Commission reached an agreement in principle with Mexico in April 2018 on the trade part of the modernisation of the 2000 Global Agreement. With Mercosur, negotiations are at an advanced stage, although it is unclear if these will be concluded before the end of 2018. The Commission has simultaneously been working on several (other) new initiatives. Negotiations for an FTA with the Philippines were formally launched in December 2015 and two rounds have taken place so far. Similar negotiations with Indonesia were launched in July 2016 resulting in four rounds of talks up till now. In November 2017, a first round of negotiations on the modernisation of the trade part of the 2002 EU-Chile Association Agreement occurred and another two rounds have since taken place. Negotiations on new FTAs with Australia and New Zealand were formally launched in June 2018 and first rounds of talks with both countries were completed in July 2018. The Commission is pursuing various other trade negotiations.

The Juncker Commission is also actively pursuing a reform of international investment protection. In response to opposition to investor-state dispute settlement (ISDS) mechanisms in FTAs, including

from the Parliament, the Commission has proposed the creation of a new investment court system (ICS) within CETA and the planned FTAs with Mexico, Singapore and Vietnam. In March 2018, the Council also authorised the Commission to negotiate a convention establishing a multilateral investment court that builds on these ICS innovations. Talks are currently taking place under the auspices of the United Nations Commission on International Trade Law (Uncitral). The Commission has also held bilateral investment negotiations with China (leading to a first exchange of market access offers in July 2018) and is preparing to launch similar talks with Taiwan and Hong Kong.

There has been less success in other areas. The TTIP-negotiations with the United States came to a halt following the election of US President Donald Trump in 2016 (although a bilateral agreement on mutual recognition of inspections of medicine manufacturers was adopted in March 2017 and another agreement on insurance and reinsurance was concluded in March 2018). The Commission has also been unable to resolve several trade conflicts with the Trump Administration (including on new US trade restrictions on EU exports and its blockage of nominations to the World Trade Organization's (WTO) Appellate Body), although President Juncker managed to reach a tentative deal with President Trump in July 2018 to avoid further escalation. Plurilateral negotiations on a Trade in Services Agreement (TiSA) were also put on hold following the US elections and talks on an Environmental Goods Agreement (EGA) have not been successful either. Furthermore, the EU's planned Economic Partnership Agreements (EPAs) with West African countries and the East African Community have not been signed by some Africans countries (negotiations were finalised back in 2014). Lastly, while the 10th WTO Ministerial Conference (MC) in 2015 resulted in the adoption of the Nairobi Package, the 11th MC in December 2017 did not produce any significant results.

The state of play of legislative files

Under the Juncker Commission, the co-legislators adopted a regulation in November 2016 amending a 2005 regulation on export of goods that could be used for capital punishment and torture, and a new regulation on trade in conflict minerals in May 2017. The Commission also adopted a proposal on a new anti-dumping calculation methodology in November 2016, which was approved by the co-legislators in late 2017. This proposal is complementary to a 2013 Commission proposal on a complete modernisation of EU trade defence instruments (TDI), which was approved by the co-legislators in the first half of 2018 and entered into force on 8 June 2018.

Other proposals of the Juncker Commission awaiting approval include: the 2016 amended proposal for a regulation on an international procurement instrument (based on a proposal from 2012); a proposal on the import of cultural goods (adopted by the Commission in July 2017); and a proposal on a European framework to screen foreign direct investment (submitted as part of the Commission's September 2017 trade package). Trilogue negotiations on this last proposal started in July 2018, after the Parliament and Council adopted their positions in May and June 2018. Lastly, the Commission submitted a proposal in May 2018 for a regulation on the apportionment of tariff rate quotas in the EU's WTO schedule following the UK's expected withdrawal in March 2019.

Implementation of the 'trade for all' strategy

In September 2017, the Juncker Commission adopted a report on the implementation of its 'trade for all' strategy. This section includes some of the report's key findings as well as new developments.
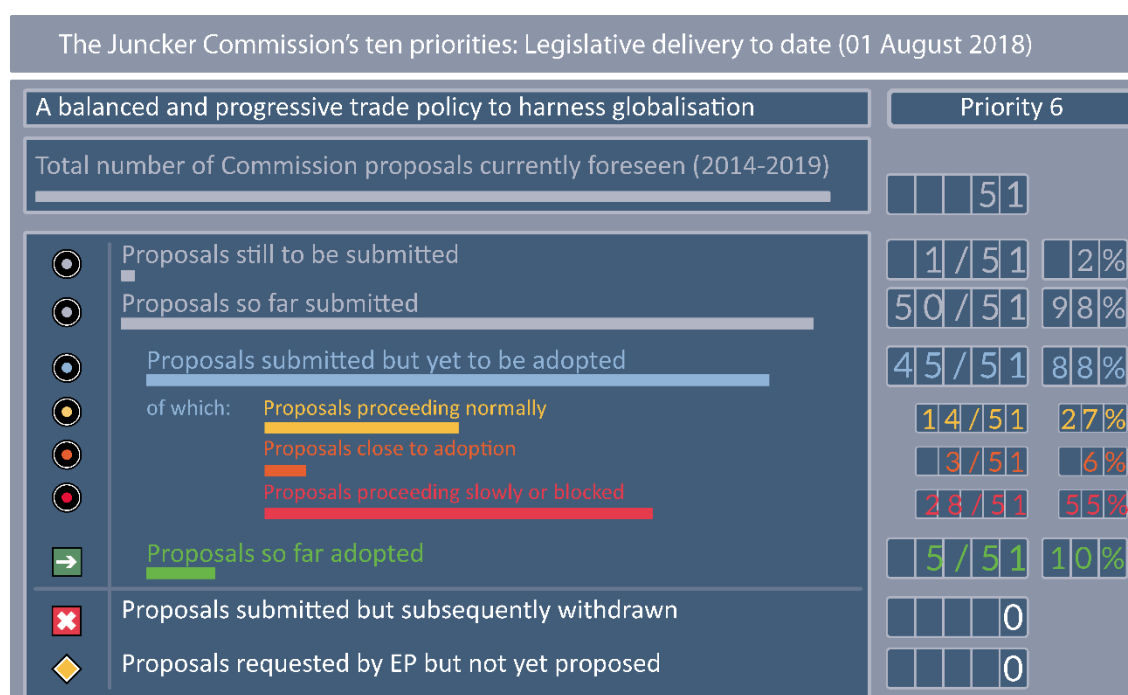
As regards a progressive EU trade policy, the Commission managed to introduce several new issues in some of the EU's FTAs. These include energy and raw materials in its agreements with Vietnam and the Ukraine, the inclusion of the aforementioned ICS in several agreements (including with Mexico), and mobility of professionals in CETA and the EU-Japan EPA. In November 2017, the

Commission also released its annual [report on the implementation of FTAs](#), which comes on top of existing annual implementation reports on specific FTAs (such as [EU-South Korea](#)).

In relation to the effectiveness of EU trade policy, the [Commission](#) tackled a number of trade barriers via the [Market Access Partnership](#) through which it coordinates its activities with Member States and businesses. For example, the Commission [resolved](#) 45 trade barriers affecting €8.2 billion worth of EU exports in 2017 and another 20 cases affecting €4.2 billion in exports in 2016. In the WTO, it is currently pursuing about [two dozen complaints](#) against 10 different trading partners on behalf of the EU. Recent cases concern [US steel and aluminium tariffs](#) and [China's technology transfer practices](#). The Commission considers that WTO rulings have also secured fair trading conditions in a number of cases, including on refrigerator exports to Russia and raw material imports from China.

As regards the transparency of EU trade policy, the Commission has instituted a [transparency in action website](#) containing all published documents on the various negotiations (although market access offers will remain confidential). As part of its September 2017 trade package, the Commission also announced the [creation](#) of an [advisory](#) [group](#) on EU trade agreements in order to foster an inclusive trade policy, which has met three times in 2018. The Commission also decided to henceforth publish its recommendations for Council negotiating directives. This is in line with repeated calls from the [Parliament](#) to increase transparency at all stages of trade negotiations.

Regarding values in EU trade policy, the Commission initiated a debate in July 2017 on trade and [sustainable development (TSD) chapters](#) in its FTAs and what could be done to improve them. Based on the subsequent discussions, it published a [non-paper](#) in February 2018 with 15 actions to be taken to revamp TSD chapters. The Commission has also suggested the launch of a [review](#) of TSD provisions in CETA. The planned modernisation of the agreement with Mexico will include new chapters on [cooperation in animal welfare and anti-microbial resistance](#) as well as [anti-corruption](#), and the Commission has proposed [similar](#) [provisions](#) and a new chapter on [trade and gender equality](#) in its negotiations with Chile. In its talks with Indonesia, the Commission has also [tabled](#) a first text on data flows. In addition, the Commission has suspended negotiations with Thailand because of concerns over fundamental rights. Finally, the EU has adopted the aforementioned amended Anti-torture Regulation and Conflict Minerals Regulation under the Juncker Commission.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)	
A balanced and progressive trade policy to harness globalisation	Priority 6
Total number of Commission proposals currently foreseen (2014-2019)	51
Proposals still to be submitted	1 / 51 2%
Proposals so far submitted	50 / 51 98%
Proposals submitted but yet to be adopted	45 / 51 88%
of which: Proposals proceeding normally	14 / 51 27%
Proposals close to adoption	3 / 51 6%
Proposals proceeding slowly or blocked	28 / 51 55%
Proposals so far adopted	5 / 51 10%
Proposals submitted but subsequently withdrawn	0
Proposals requested by EP but not yet proposed	0

Priority 7: An area of justice and fundamental rights based on mutual trust

President Juncker's 2014 political guidelines were ambitious in relation to strengthening justice and fundamental rights across the EU. However, over the past couple of years, the EU has been increasingly confronted with major security challenges, which has led to a shift in the focus of EU measures within the area of freedom, security and justice, with security issues increasingly dominant. In particular, a series of terrorist attacks has meant that issues such as radicalisation, terrorism financing and information sharing now figure higher than ever on both national and EU agendas.

Enhancing security and combating terrorism

Two important counter-terrorism instruments, adopted in 2017, have to be transposed by Member States by September 2018: a revised Firearms Directive, as part of a package of measures aiming at stronger firearms control, and a directive on combating terrorism, aimed at implementing new international standards as regards the criminalisation of a wide range of terrorist activities. Moreover, the Passenger Name Records (PNR) Directive, adopted in 2016, was due to be transposed by Member States by 25 May 2018. However, in June 2018, despite the Commission's efforts, only half had adopted the necessary measures.

The implementation of the action plan to fight terrorist financing is well advanced. While the fifth Anti-Money-Laundering Directive was adopted in May 2018, political agreements have been reached by the Parliament and the Council on proposals regarding the harmonisation of criminal sanctions for money laundering, controls on cash entering or leaving the Union and the mutual recognition of criminal asset freezing and confiscation orders.

With a view to better information sharing, significant progress has been achieved in improving the existing EU information systems and developing new complementary tools. The security dimension of border management has been reinforced with the adoption of the regulation on a European travel information and authorisation system (ETIAS) in July 2018, and the provisional agreement reached by the Parliament and the Council on the package of proposals for regulations on the Schengen information system, including one in the field of police cooperation and judicial cooperation in criminal matters. Moreover, trilogue negotiations are ongoing on the Commission proposals to upgrade the European criminal records information system (ECRIS) and to establish a centralised system for the identification of convicted third-country nationals (ECRIS-TCN).

To enhance operation of the existing and new systems, the Commission adopted, in December 2017, two legislative proposals on their interoperability: one for police and judicial cooperation, asylum and migration, and another for borders and visa. The proposed interoperability solutions include a European search portal, a shared biometric matching service, a common identity repository and a multiple-identity detector. Their development and centralised management would be the task of the EU agency for the operational management of large scale IT systems (eu-LISA) - the extension of its mandate was adopted by the co-legislators in July 2018.

With regard to information sharing in counter-terrorism, Europol's role has been reinforced, namely with the creation, within its structure, of the European Counter-Terrorism Centre (ECTC) in January 2016 and the entry into force of the new Europol Regulation in May 2017. The ECTC pools and streamlines Europol's resources and expertise in terrorism travel and financing, illegal arms trafficking, and countering online terrorist propaganda. As for the latter, the creation of the

EU Internet Referral Unit (EU IRU), which is part of the ECTC, and of the EU Internet Forum, bringing together Europol, national governments, and technology companies to counter terrorist content and hate speech online, are among the most important developments.

To speed up the fight against extremism and propaganda on the Internet, the Commission adopted in March 2018 a recommendation on measures to effectively tackle illegal content online. This puts particular emphasis on terrorist material, requiring platforms to remove such material within one hour of receiving notification by law enforcement authorities or Europol. In its broader efforts to tackle radicalisation, the Commission set up a dedicated high-level expert group on radicalisation (HLCEG-R), which published a final report in May 2018. This and further steps to counter radicalisation were announced as part of a package of anti-terrorism measures, adopted in October 2017 and including action plans on the protection of public spaces and on chemical, biological, radiological and nuclear (CBRN) risks, as well as a recommendation on explosive precursors (followed by a legislative proposal in April 2018).

There have also been important developments regarding the EU's cooperation with its international partners. In July 2017, the Court of Justice of the EU (CJEU) delivered an opinion in which it stated that the 2014 Agreement between Canada and the EU for the transfer and use of passenger name records (PNR) could not be concluded in its current form. The Court held that several of its provisions were incompatible with the fundamental rights recognised by the EU, in particular the right to data protection and respect for private life. Negotiations on the new agreement were launched in June 2018. Also in June, the Council adopted two decisions concerning the conclusion, on behalf of the EU, of respectively the Council of Europe Convention on the Prevention of Terrorism and of its Additional Protocol on foreign terrorist fighters.

Developments in the area of justice and fundamental rights

Although the progress in the area of justice proved to be rather slow, some key instruments have been or are close to being adopted, while preparatory work is ongoing in new areas, such as criminal justice in cyberspace.

Legislative developments in criminal justice

As no agreement could be reached in the Council on the proposal concerning the European Public Prosecutor's Office (EPPO), 20 Member States adopted the regulation under enhanced cooperation in October 2017, having received the Parliament's consent. Two other Member States decided to join later. The EPPO will investigate, prosecute and bring to judgment by national courts the perpetrators of offences defined by the directive on the fight against fraud to the Union's financial interests by means of criminal law ('PIF Directive'), adopted in July 2017. In June 2018, the Parliament and the Council reached a compromise on the new Eurojust regulation, which includes provisions on the relationship between Eurojust and the EPPO.

The Commission made significant progress in its work on a common EU approach to enforcement of jurisdiction in cyberspace. Building on the conclusions of the expert process launched in 2016, the Commission adopted in April 2018 two legislative proposals to facilitate cross-border access to electronic evidence: one on European production and preservation orders and another on the appointment of legal representatives by service providers operating in the EU.

Harmonising data protection
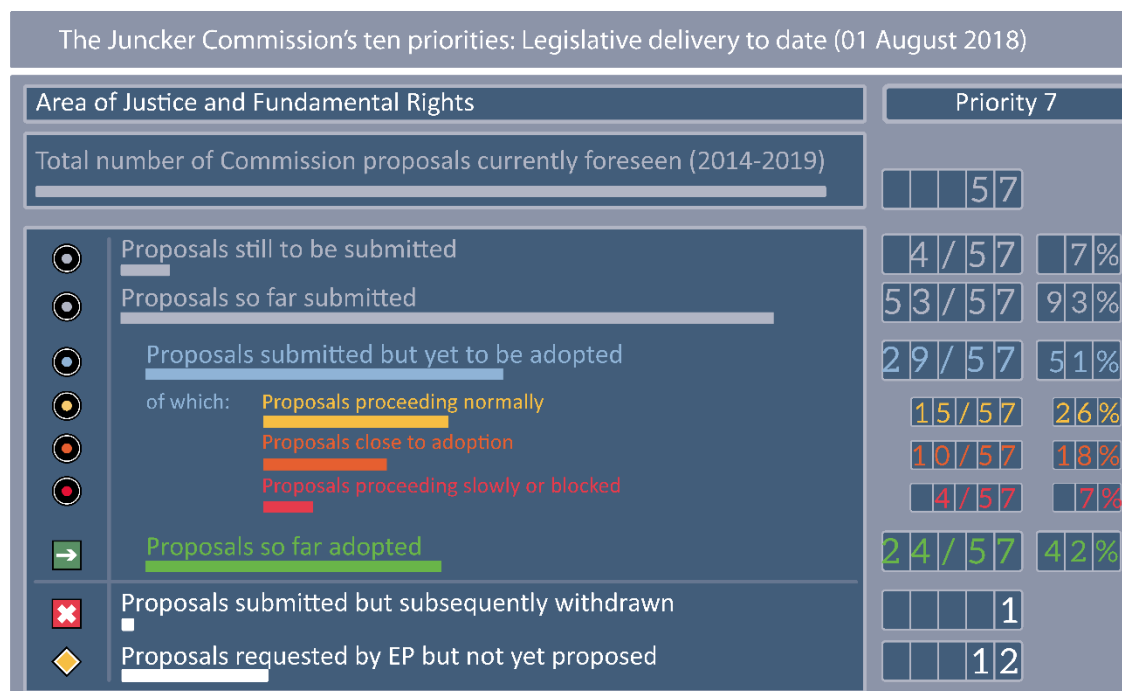
The reform package on EU data protection (including the General Data Protection Regulation (GDPR) and the Directive for Police and Criminal Justice Authorities), adopted in 2016, became fully applicable as of May 2018. In order to have a coherent legal framework and in parallel to the

proposal for a regulation repealing the e-Privacy Directive (see priority 2), the Commission's proposal for a regulation on data processed by EU institutions or agencies aims to align the existing rules (Regulation (EC) No 45/2001) with the stringent ones set out in the reform package, while reducing administrative burden. In May 2018, a political agreement was reached: the compromise includes general rules on operational data processed by Union agencies when carrying out activities in the field of police and judicial cooperation, while retaining specific provisions in the founding acts of these agencies.

Regarding transatlantic data transfer for commercial purposes, following the *Schrems* case and the adoption by the Commission of its adequacy decision on the EU-US 'Privacy Shield', improvements were recognised in a joint EU-US review of this new framework, although unresolved issues have to be addressed in 2018 to avoid another court case. The Parliament has expressed its concerns on several occasions, including in a resolution adopted in July 2018, calling for the suspension of the Shield until the US authorities are fully compliant, in the broader context of the Facebook/Cambridge Analytica scandal. The Commission also intends to adopt new adequacy decisions concerning Japan and Korea.

Addressing violence against women

The EU accession to the Council of Europe Convention to fight violence against women and domestic violence (the Istanbul Convention signed by all 28 EU Member States and ratified by 19) reached its final stage, with the adoption by the Council, in May 2017, of two decisions on the signing of the Istanbul Convention and with its signature by Commissioner Věra Jourová on behalf of the EU, in June 2017. The last step to be made is the adoption of the Council decision on its conclusion, to which the Parliament gave its consent in September 2017. It has repeatedly called for EU accession to this convention, and for its ratification by Member States, for example in its resolutions of 2014, 2015, 2016 and 2017. However, no agreement has been reached in the Council so far.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

Area of Justice and Fundamental Rights	Priority 7
Total number of Commission proposals currently foreseen (2014-2019)	57
⊙ Proposals still to be submitted	4 / 57 — 7%
⊙ Proposals so far submitted	53 / 57 — 93%
⊙ Proposals submitted but yet to be adopted	29 / 57 — 51%
of which: Proposals proceeding normally	15 / 57 — 26%
Proposals close to adoption	10 / 57 — 18%
Proposals proceeding slowly or blocked	4 / 57 — 7%
→ Proposals so far adopted	24 / 57 — 42%
✖ Proposals submitted but subsequently withdrawn	1
◆ Proposals requested by EP but not yet proposed	12

Priority 8: Towards a new policy on migration

Since taking office in 2014, the European Commission, on the basis of its 2014 political guidelines, and especially the European Agenda on Migration adopted as a response to the unprecedented levels of migration flows to Europe in 2015, has been taking concrete actions to deliver what it calls an effective, fair and robust EU migration policy. The Commission's aim has been to reduce the incentives to irregular migration, save lives and secure external borders, establish a strong EU asylum policy, and provide more legal pathways for asylum-seekers and more efficient legal channels for regular migrants. Four years into its mandate, the Commission has delivered on most of those aspects by proposing or implementing immediate and longer-term measures focusing on the internal and external dimensions of the EU's migration policy, the EU's external borders and on the legal aspects of migration.

Internal aspects: solidarity and responsibility

One of the first urgent measures was intended to alleviate the migratory pressure on Greece and Italy, which have borne the brunt of the influx of migrants. The aim was to relocate eligible applicants for international protection – nationalities with an overall asylum recognition rate of 75 % or higher in EU Member States – to other Member States, thus ensuring fair and balanced distribution and sharing of responsibility for asylum-seekers in the EU. The May 2018 progress report shows that relocation under this provisional mandatory mechanism has been a success, with overall 96 % of eligible persons having been relocated. However, not all Member States were willing to participate in the scheme, reflecting contrasting attitudes in public opinion and difficulties in balancing solidarity and responsibility between different EU countries. Following the political deadlock, on 7 December 2017, the Commission referred the Czech Republic, Hungary and Poland to the Court of Justice of the EU (CJEU) for failing to contribute to relocation in breach of their legal obligations, the validity of the relocation scheme having been confirmed by the CJEU in a September 2017 judgement.

Under the existing common European asylum system (CEAS), asylum seekers are not treated uniformly and recognition rates in different EU countries vary. Besides, only a few countries, based on their geographical position, are responsible for essentially all asylum claims submitted within the EU. In order to make the legal framework more efficient, harmonised, fair and resistant to future migratory pressures, the Commission launched its reform in May and July 2016. It introduced two packages of proposals, covering fair allocation of asylum applications among Member States and providing a common set of rules at EU level to simplify and shorten the asylum procedure, discourage secondary movements and increase the prospect of integration. More than two years after their introduction, discussions on these aspects in the European Parliament and the Council have reached various stages of progress within the legislative process. The most controversial issue involves reaching a compromise between Member States on the principles of solidarity and fair sharing of responsibility for asylum seekers and changing the so-called Dublin system, a cornerstone for the new legal framework, which determines the EU Member State responsible for examining an application by an asylum seeker seeking international protection.

According to the Commission's contribution to the Leaders' meeting of December 2017, a political agreement on the overall reform of the CEAS was expected by June 2018. However, no breakthrough was achieved at the European Council's summit of 28 June, showing that differences remain among Member States as regards, in particular, reform of the Dublin regulation. The Council of the EU was tasked with concluding work on the files as soon as possible.

External aspects: partnership and assistance

With migration quickly gaining importance on the EU agenda but governments unable to find a compromise on internal aspects of the EU's migration policy, the European Commission gradually shifted its attention towards cooperation with third countries on addressing migratory challenges beyond the EU's borders. Mainstreaming migration in development cooperation policies, which has been addressed in the European Parliament's resolution of April 2017, has become one of the top priorities in EU relations with third countries and the main instrument to secure their commitments.

The Commission's priority has been to reduce the incentives for irregular migration and to ensure that the EU's future migration policy gives protection to those who genuinely need it and return those who do not have the right to stay in the EU, thereby preventing considerable loss of lives. Thus, besides focusing on improving its own capacities for return through the renewed return action plan, the Commission has been concluding re-admission agreements or practical arrangements with countries of origin and transit from Africa and Asia. In 2016, it devised a new partnership framework with third countries, intended, among other things, to increase cooperation on return and re-admission. Nevertheless, as stated by the Commission, the return rate has decreased from 34.5 % in 2016 to 29.2 % in 2017 and securing third countries' cooperation on re-admission of own nationals remains a challenge for the EU.

Cooperation with third countries based on partnership also includes addressing the root causes of irregular migration, improving reception conditions for refugees and their families closer to home, and helping communities that host the largest share of displaced people. For this purpose, several financial instruments and projects were set up, covering different themes in different parts of the world.

To support the most vulnerable in need of international protection and help them find a safe pathway to Europe, the Commission, together with Member States, established several resettlement mechanisms, such as the emergency scheme, which ended in 2017, and the new scheme, which expires in October 2019. Additionally, the EU has been cooperating with international organisations and third countries, via the emergency transit mechanism in Libya and the EU deal with Turkey, to open up organised and safe channels to Europe for refugees. In total, up to May 2018, over 32 000 people have been resettled to the majority of the EU Member States.

Measures at external borders

A key element in the EU's support to its Member States located at its external borders, notably Italy and Greece, has been the hotspot approach, established in September 2015. This operational support includes identifying and registering every arrival of asylum seekers and providing adequate reception conditions and capacity. Although the fingerprinting of migrants has progressed and, according to the Commission figures, has reached close to 100 %, reception conditions remain a major concern, especially on Greek islands, where, despite the March 2016 EU-Turkey deal intended to stem irregular migration from Turkey to the EU, reception centres remain severely overcrowded.

Although 2017 saw a significant fall in detected illegal crossings along the EU's external borders, mainly on the eastern and central Mediterranean migratory routes, the overall pressure on Europe's external borders remains relatively high. In tackling migratory challenges along different routes, the Commission has been focusing on ensuring EU presence at sea to save lives and dismantle human trafficking and smuggling networks. It has also focused on making better use of the opportunities offered by information systems and technologies (IT), such as the reinforcement of controls at external borders and creating a system to register entry and exit of third-country nationals. One of

the biggest achievements has been the establishment in September 2016 of the [European Border and Coast Guard Agency](#), which happened in record time. The Agency provides enhanced support for Member States in the field of migration management, the fight against cross-border crime, and search and rescue operations. However, in a [May 2018 report](#), serious gaps were identified in Member States' pledges in human and technical resources, which could severely limit the implementation of the activities of the Agency at the land, sea and air borders.

More efficient legal channels for regular migrants

Migration is not only a challenge but also an [opportunity](#) for the EU. In view of the future challenges in terms of an ageing population and an economy that is increasingly dependent on highly-skilled jobs, migration will be an important tool to enhance the sustainability of EU countries' welfare systems and to ensure sustainable growth of the EU economy. Hence, the Commission proposed a revision of the system – in place since 2009 – aimed at offering more flexible admission conditions, improved admission procedures and enhanced rights for [highly qualified workers](#). The act revising this system has been in trilogue discussions since September 2017, but progress has proved difficult due to considerable differences in the respective positions of the co-legislators.

However, attracting migrants is not enough and should be accompanied by measures for their effective integration into the host societies. For this purpose, the Commission adopted an [action plan](#) and is providing [funding](#) to support EU countries in tapping into the economic, social and cultural potential of third-country nationals, including of asylum-seekers and refugees.

June 2018 was a crucial month for the EU leaders to agree an EU approach towards migration. After an [informal meeting](#) on 24 June, and after the Commission presented [elements](#) on which the European Council could make progress at the summit of 28 June, the EU leaders achieved no breakthrough in terms of internal aspects of migration and the EU's asylum policy. Instead, due to domestic political situations and pressures in some Member States, the European Council [conclusions](#) prioritise strengthening the EU's external borders and preventing migrants from reaching Europe in the first place by stemming illegal migration on all existing and emerging routes.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

Towards a new policy on migration	Priority 8

Total number of Commission proposals currently foreseen (2014-2019)	41

Proposals still to be submitted	4 / 41	10%
Proposals so far submitted	37 / 41	90%
Proposals submitted but yet to be adopted	22 / 41	53%
of which: Proposals proceeding normally	17 / 41	41%
Proposals close to adoption	0 / 41	0%
Proposals proceeding slowly or blocked	5 / 41	12%
Proposals so far adopted	15 / 41	37%
Proposals submitted but subsequently withdrawn	4	
Proposals requested by EP but not yet proposed	2	

Priority 9: A stronger global actor

In his State of the Union address in late 2017, Commission President Juncker re-emphasised his vision of the EU as a stronger global actor with 'more weight in the world', a statement consistent with the political guidelines he had presented on taking up his position in 2014. For the past four years, the Commission work programme has maintained a strong focus on foreign policy and on presenting a united EU front externally, including in the areas of relations with neighbours, development policy and security.

Neighbourhood policy and enlargement

Following a joint consultation on the future of the European neighbourhood policy (ENP) in March 2015 and the European Parliament's consecutive resolution in July 2015, the European Commission adopted a communication on review of the ENP. The Council adopted conclusions on this review in December 2015, welcoming the Commission's proposals and inviting the High Representative for Foreign Affairs and Security Policy/Vice-President (HR/VP) of the European Commission, Federica Mogherini, and the Commission to provide regular reporting to track developments in the neighbourhood. The proposal on EU participation in a partnership for research and innovation in the Mediterranean area (PRIMA) was adopted by the co-legislators in July 2017.

The 2018 Commission Work Programme (CWP) sets the focus on enlargement, prioritising the accession of Serbia and Montenegro as frontrunner candidates in the Western Balkans. On 6 February 2018, as a follow-up to the Commission President's letter of intent to the European Parliament, the Commission published its new enlargement strategy for the Western Balkans, focusing on six flagship initiatives. In May 2018, at the EU-Western Balkans summit in Bulgaria, EU leaders agreed on the Sofia declaration, with which these partners have aligned themselves.

Development

In February 2015, the European Commission adopted a communication on a global partnership for poverty eradication and sustainable development after 2015. In May 2015, the European Parliament welcomed the communication in a resolution, but regretted a certain lack of commitment concerning the timeline for future financial targets, and the Council adopted conclusions on a new global partnership for poverty eradication and sustainable development after 2015. An agreement was reached at the UN Conference in Addis Ababa in July 2015, providing a basis for implementing the global sustainable development agenda, which world leaders adopted in September 2015.

In its resolution on the 2016 Commission work programme, Parliament called on the Commission to deliver a follow-up action plan to the European consensus on humanitarian aid, and to focus on fragile states, peace-building and state-building in its development policy. In December 2017, the co-legislators adopted the European Commission's proposal to facilitate EU budgetary support for capacity-building programmes in third countries.

The 2016 CWP also envisaged a recommendation to open negotiations in anticipation of the expiration of the Cotonou Partnership Agreement in 2020. As a further step in preparing negotiations for a new partnership beyond 2020, the European Commission adopted a joint communication on renewed partnership with the African, Caribbean and Pacific Group of States (ACP) countries in November 2016. In December 2016, the Plenary ACP-EU Joint Parliamentary Assembly issued a declaration on the parliamentary dimension of ACP-EU relations in the post-Cotonou framework. In its resolution of 14 June 2018 on the upcoming negotiation, the Parliament called in particular for the inclusion in the new agreement of a strong focus on the

Agenda 2030 and poverty eradication, a detailed list of human rights abuses to be combated, stronger political dialogue, and better involvement of national parliaments, local authorities and civil society. On 22 June 2018, the Council adopted its negotiating mandate. On 30 May 2018, the ACP countries adopted their own position for negotiations, expected to start by the end of August.

In November 2016, the European Commission adopted the communication 'proposal for a new European consensus on development – our world, our dignity, our future', aiming to integrate the Agenda 2030 sustainable development goals (SDGs) into the EU development framework. Based on a resolution of February 2017, the European Parliament actively participated in the interinstitutional negotiations that led to the signature of the new consensus on development on 7 June 2017. As requested by the Parliament, poverty eradication remains the main objective of EU development policy, which should also contribute to the overall objectives of EU external action, including building resilience and addressing the root causes of migration.

Boosting investment in developing countries, with the help of the new European external investment plan (EIP), will be one of the ways to tackle those issues. In this vein, in September 2017, the co-legislators adopted the regulation establishing the European Fund for Sustainable Development (EFSD) to scale up resources in order to address the root causes of migration and to contribute to the achievement of the SDGs based on existing facilities. In March 2018, the co-legislators adopted an amendment to the Guarantee Fund for External Actions, which contains ancillary provisions for the functioning of the EIP and, more specifically, a private sector lending mandate for the European Investment Bank (EIB).

Security and defence

The European Council of 28 June 2016 welcomed the High Representative's global strategy: 'shared vision, common action: a stronger Europe'. On 14 November 2016, the HR/VP presented an implementation plan on security and defence aspects of the global strategy to the Council, which encouraged the Commission to support Member States in implementing defence capability priorities. Alongside the European Defence Action Plan and the EU-NATO Joint Declaration, the plan constitutes one of three parts of the HR/VP's 'defence package'.

The 2016 CWP included several additional initiatives in the area of security, such as an EU-wide strategic framework for supporting security sector reform (SSR) and a European defence action plan. In July 2016, the European Commission and the HR/VP presented a joint communication entitled 'elements for an EU-wide strategic framework to support security sector reform'. The co-legislators adopted in December 2017 a regulation amending a 2014 regulation establishing an instrument contributing to stability and peace. The Commission's proposal aimed to adapt the existing regulation to revised reporting directives on official development assistance (ODA) on peace and security, and strengthen the EU's role as a security provider by offering new funding opportunities for military capacity building in third countries. The revised instrument introduces the possibility for the EU to finance measures in support of capacity building for security and development (CBSD) of military actors in partner countries, with the objective of contributing to sustainable development and in particular the achievement of peaceful and inclusive societies.

The European defence action plan (EDAP) was unveiled on 30 November 2016. In the plan, the Commission proposed a European Defence Fund (EDF) to support collaborative research projects and joint development of defence capabilities; support small- and medium-sized enterprises (SMEs) through fostering investments and providing more cross-border opportunities in defence supply chains, and ensure Europe has an open and competitive single market for defence. In a March 2017 resolution, the European Parliament welcomed the EDAP and called on the Commission and the
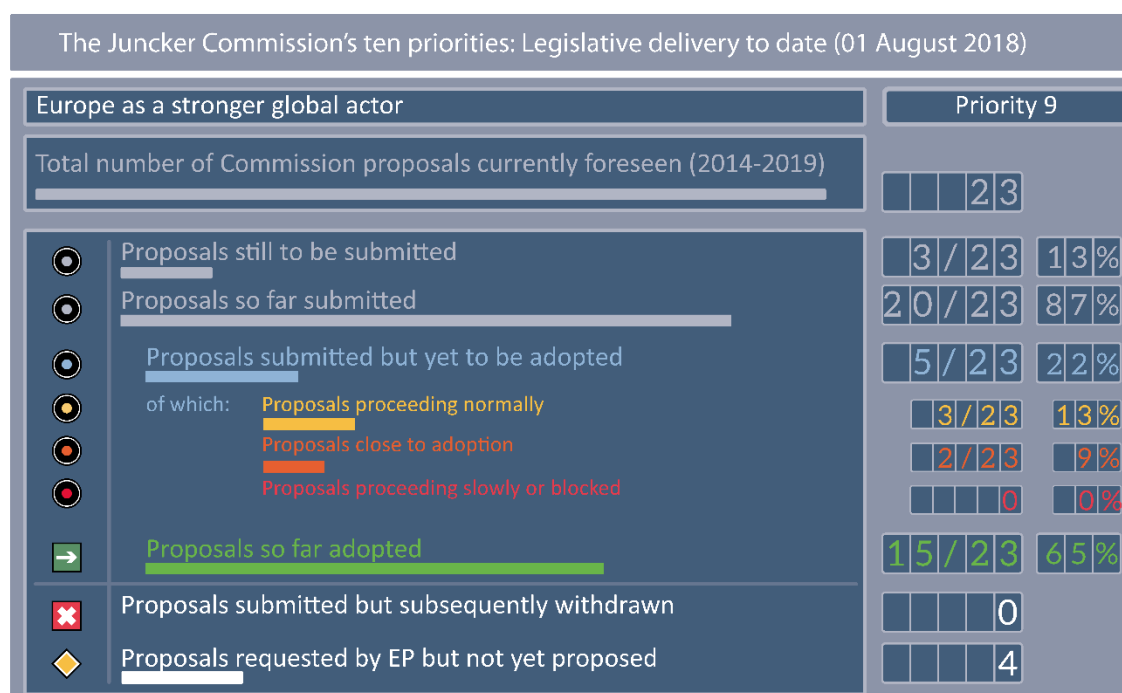
Member States to clarify thoroughly the governance, financing and objectives of the possible EDF, notably the capability and research 'windows'.

The EDF was launched in June 2017 with two strands: on the one hand research, on the other, development and acquisition. Research will be funded directly by the EU, with €500 million each year starting in 2020, €25 million already for 2017 and €90 million until the end of 2019, and with a legislative proposal for a regulation establishing a European defence industrial development programme (EDIDP) through which the EU will offer co-financing from the EU budget. After trilogue negotiations between Parliament and Council, a provisional agreement was reached in May 2018 and approved during the Parliament's July plenary session. In June 2018, the Commission put forward a proposal for the establishment of the European defence fund within the next multiannual financial framework (MFF).

The focus of the 2018 CWP included delivering on the Global Strategy, several aspects of which advanced considerably in 2017. In June 2017, the Council established the military planning and conduct capability (MPCC) within the EU military staff (EUMS). The MPCC will assume command of EU non-executive military missions. Moreover, in November 2017, the Council welcomed the common notification by 23 Member States of their intention to participate in the Permanent Structured Cooperation (PESCO), in the field of defence. PESCO is a permanent framework for defence cooperation, which will allow participating Member States to jointly develop defence capabilities, invest in shared projects, or enhance the operational readiness of their armed forces. A list of PESCO projects was formally adopted by the Council – meeting for the first time in 'PESCO' format – in March 2018. On the same day, the Council also welcomed the launch of the trial run of the coordinated annual review on defence (CARD) and the presentation of the Joint Communication on Military Mobility from the High Representative and the Commission. In addition, on 5 December 2017, the Council welcomed further progress made in EU-NATO cooperation.

In June 2018, the HR/VP presented a proposal for a European Peace Facility (EPF), which is designed to allow financing of all common foreign and security policy (CFSP) external action with military and defence implications. The aim behind the creation of the EFP is to enhance the EU's ability to safeguard European security interests and prevent conflict, build peace and strengthen security around the world. The proposal is also in line with the objective of enhancing the consistency of the CFSP, which is included in the 2018 CWP with a 2025 perspective.

The European Parliament supports the development of a strong common security and defence policy (CSDP) and defence cooperation, but with reservations expressed in three resolutions adopted in May 2015. Parliament adopted an important resolution on a European defence union in November 2016. In 16 March 2017, it urged the Council to take concrete steps towards the harmonisation and standardisation of the European armed forces and called on the Council and the HR/VP to produce an EU white paper on security and defence. In June 2018, the European Parliament adopted a resolution on EU-NATO relations.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

Europe as a stronger global actor | **Priority 9**

Total number of Commission proposals currently foreseen (2014-2019) — **23**

⊙ Proposals still to be submitted	3 / 23	13%
⊙ Proposals so far submitted	20 / 23	87%
⊙ Proposals submitted but yet to be adopted	5 / 23	22%
⊙ of which: Proposals proceeding normally	3 / 23	13%
⊙ Proposals close to adoption	2 / 23	9%
⊙ Proposals proceeding slowly or blocked	0	0%
→ Proposals so far adopted	15 / 23	65%
✖ Proposals submitted but subsequently withdrawn	0	
◆ Proposals requested by EP but not yet proposed	4	

Priority 10: A union of democratic change

Commission President Juncker's 2014 political guidelines expressed an intention to make the EU more democratic, open and accountable. This was to be achieved, inter alia, by revitalising the 'special partnership' with the European Parliament, enhancing transparency, strengthening political – and not technocratic – dialogue with EU legislators, and improving cooperation with national parliaments. Since this Commission took office, it has gone a long way in proposing substantial initiatives to foster the above aims, even if some of them still need to be finalised. Better law-making, including an interinstitutional agreement (IIA) to that end, transparency, and improving the democratic functioning of the EU, have been at the core of such initiatives falling under this priority.

Interinstitutional Agreement on Better Law-Making

In a mission letter of 1 November 2014 to Frans Timmermans, the First Vice-President of the Commission, President Juncker stated that 'respect for the principles of subsidiarity, proportionality and better regulation will be at the core of the work of the new Commission.' In May 2015, a comprehensive better regulation package followed, including a proposal for an interinstitutional agreement. The IIA entered into force in April 2016 and expressed the three institutions' shared commitment to promote simplicity, clarity and consistency of Union legislation, and better coordination and transparency of the legislative process. It strengthened interinstitutional cooperation on the EU's programming, and put stronger emphasis on the way Union law is implemented and applied in practice.

The full implications of the IIA in the longer run have still to emerge. However, it is broadly agreed that a 'better law-making culture' is gradually taking hold within and across the EU institutions, although much remains to be done. The Parliament resolution of 30 May 2018 on the interpretation and implementation of the IIA takes stock of the initial period of such implementation and notes outstanding issues of concern. It welcomes the progress made so far in implementing the agreement, noting, in particular, the two joint declarations on the EU's legislative priorities (for 2017 and 2018/2019), improved access for Parliament experts to documents and meetings concerning the preparation of delegated acts, and the now operational joint register of delegated acts.

The resolution also highlights issues where implementation efforts should be stepped up and/or which remain unsatisfactory for the Parliament. For example, negotiations on information sharing when negotiating and concluding international agreements, and on the non-binding criteria for delineation of delegated and implementing acts (DIAs), have still to be concluded. The resolution expresses 'dissatisfaction' regarding the Council's reluctance to accept the use of delegated acts where Article 290 TFEU criteria are met, despite the concessions made regarding consultation of national experts in the preparation of such acts. It calls for a better flow of information from the Council and for greater efforts to set up a joint database on the state of play of legislative acts to improve traceability, as required by the IIA. The resolution also reiterates the call to Member States to be transparent about 'gold-plating' when transposing Union legislation, and emphasises the need to distinguish between the introduction of additional administrative requirements on the one hand, and the setting of higher (environmental, consumer protection or health and safety) standards on the other.

Subsidiarity and national parliaments

In his 2014 political guidelines, President Juncker declared that he attached 'great importance' to the interaction with national parliaments, in particular in enforcing the principle of subsidiarity. He set out to explore ways to improve such interaction 'as a way of bringing the European Union closer

to citizens.' The ensuing better regulation guidelines signalled reinforced commitment to subsidiarity, and reminded Commission services that other EU institutions, national parliaments as well as the Committee of the Regions will closely scrutinise compliance with the principle.

The Commission reports that, in 2016, it received 65 reasoned opinions from national parliaments regarding the principle of subsidiarity, which was the third highest number since the introduction of the subsidiarity 'early warning' mechanism in 2009. In 2016, national parliaments issued the third 'yellow card', which concerned the review of the Posting of Workers Directive. 2016 also saw an increase in parliaments' contributions under the so-called 'political dialogue', a less formalised 'complement' to the 'early warning' mechanism that is not limited to subsidiarity (650 contributions in total). The number of Commissioners' visits to national parliaments, which is another dimension of the political dialogue, has increased in recent years.

Following up on his commitment to put subsidiarity at the centre of the Commission's work, in November 2017 President Juncker created a task force on subsidiarity, proportionality and 'doing less more efficiently'. In its report of 10 July 2018, the task force concluded, inter alia, that, in order to face important emerging challenges, there is need for *more* or *intensified* EU action in certain areas, such as security, defence, migration, climate change and innovation. It called for a 'new way of working' based on a 'better shared understanding' of the principles of subsidiarity and proportionality and their more structured and consistent application. Parliament's resolution of 30 May 2018 on the implementation of the IIA welcomed the establishment of the task force, but the Parliament decided not to participate in its work – a decision which President Juncker fiercely criticised.

Transparency, integrity and interest representation

Increased transparency is among the main prerequisites for making the Union more accountable and democratic, as envisaged in the 2014 political guidelines. Among several initiatives taken with this aim – including Commission decisions requiring Commissioners, their cabinets and Directors-General to make public all information concerning their meetings with lobbyists, and updated rules on expert groups, the Commission submitted a proposal for an interinstitutional agreement on a mandatory transparency register in September 2016. The negotiations on this are still ongoing.

The Commission has also strengthened its Code of Conduct for Commissioners, including an extended 'cooling-off' period during which former Commissioners and Commission presidents are required to inform the Commission before taking up a new job and are subject to restrictions regarding certain activities (from 18 months to two years and three years respectively). In May 2018, the European Ombudsman, Emily O'Reilly, welcomed such initiatives, notably the changes to the Code of Conduct, better information regarding expert groups, as well as the so far 'fairly transparent manner' of conducting the Brexit negotiations – 'at least by the EU side'. At the same time, the Ombudsman noted that there remains room for improvement, and emphasised the need for the institutions not only to be transparent, but also to be *perceived* as such. In this context, she referred to her inquiry regarding the recent appointment by the Commission of its new Secretary-General – an issue which was also the subject of a Parliament resolution of 18 April 2018. The Ombudsman criticised in particular the Council for its 'old-style diplomacy' at the cost of transparency.
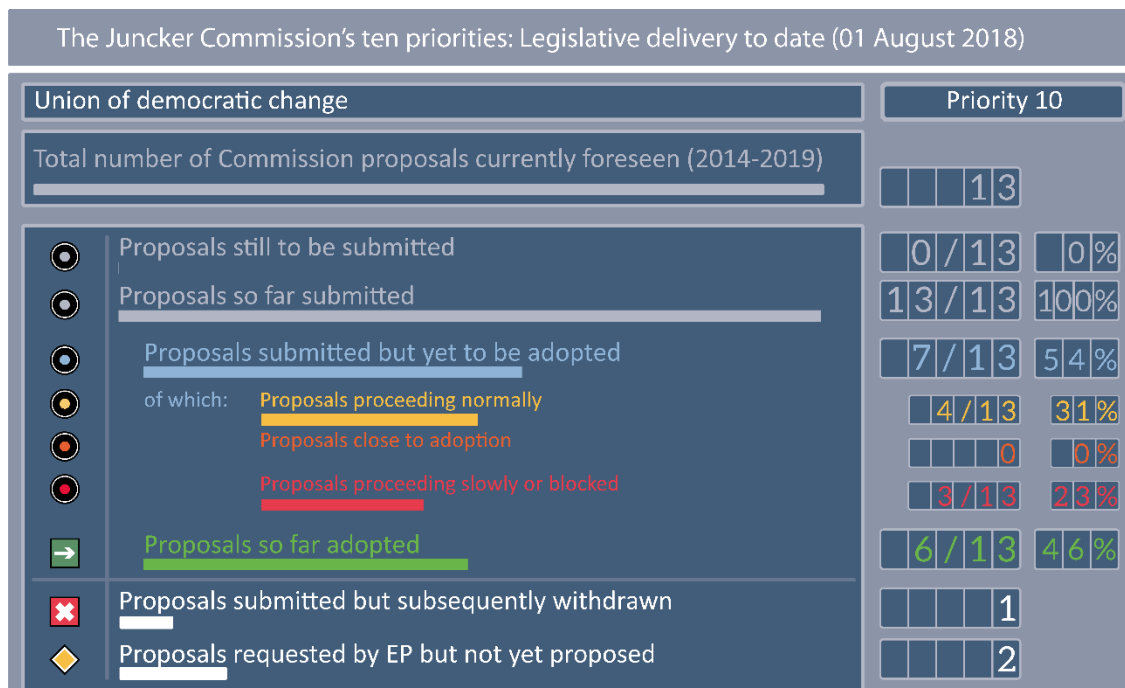
Democratic functioning of the EU: representation and participation

Albeit not foreseen in its work programme, on 13 September 2017, the Commission presented two proposals to revise (i) the Regulation on Funding European Political Parties and Foundations and (ii) the European Citizens' Initiative Regulation. Both initiatives respond to Parliament's demands –

in its resolutions of 15 June 2017 and of 28 October 2015 respectively – to submit appropriate reform proposals. The first initiative entered into force on 4 May 2018 as a new regulation aiming, inter alia, to foster transparency regarding the link between European and national parties and to protect the Union's financial interests. The second proposal – to reform the European Citizens' Initiative (ECI) Regulation – is aimed at bringing the EU closer to its citizens. The proposal would respond to and largely incorporate the numerous suggestions made by various actors (including the Parliament, European Ombudsman, the EU advisory committees and many others) on improving the functioning of the ECI. With the aim of making it a more user-friendly and effective tool for citizen participation, the proposal would introduce several changes, among which limiting personal liability of ECI organisers, partial registration of initiatives by the Commission (which the Commission has started doing already), and simplifying data requirements for signatories. Stakeholders have generally welcomed the proposal, in particular the efforts to simplify data requirements, but called for strengthened (political) follow-up of successful initiatives. On 20 June 2018, the Parliament's Constitutional Affairs Committee (AFCO) adopted its report on the Commission proposal and the decision to enter into interinstitutional negotiations; actors have expressed confidence that the initiative could be finalised before the end of 2018.

Amidst growing concerns about the potentially harmful effects of 'fake news' on the future of EU democracy, as expressed in, for example, Parliament's resolution of 15 June 2018, the Commission presented a communication in April 2018 on tackling online disinformation.

Besides the above initiatives, the Commission has launched a general reflection process regarding the future of the EU by adopting a white paper on the Future of Europe in March 2017, which has already stimulated genuine debate on the identified possible scenarios. Looking ahead to the forthcoming European elections, President Juncker – himself for the first time elected by the Parliament following the *Spitzenkandidaten* procedure – has expressed his strong support for the continuation of the procedure, suggesting that, 'if you want to strengthen European democracy, then you cannot reverse the democratic progress seen with the creation of lead candidates'.

The Juncker Commission's ten priorities: Legislative delivery to date (01 August 2018)

Union of democratic change	Priority 10
Total number of Commission proposals currently foreseen (2014-2019)	13
Proposals still to be submitted	0 / 13 0%
Proposals so far submitted	13 / 13 100%
Proposals submitted but yet to be adopted	7 / 13 54%
of which: Proposals proceeding normally	4 / 13 31%
Proposals close to adoption	0 0%
Proposals proceeding slowly or blocked	3 / 13 23%
Proposals so far adopted	6 / 13 46%
Proposals submitted but subsequently withdrawn	1
Proposals requested by EP but not yet proposed	2

3. The next multiannual budget plan

The 2021-2027 multiannual financial framework and own resources

With the current (2014-2020) multiannual financial framework (MFF) entering its final phase, the EU has started preparing the post-2020 plan – the MFF sets ceilings on categories ('headings') of EU expenditure within which the EU's annual budgets are negotiated. For the European Commission, it is an opportunity to respond to a set of longstanding issues concerning how the EU finances its priorities and to address new issues arising from a political landscape that has changed profoundly since 2013, when the EU last negotiated its multiannual budget plan. Chief among these are the pressures affecting both the spending and revenue sides of the budget, i.e. respectively, on the one hand, new challenges linked to migration and security threats and, on the other hand, the loss of a major net contributor country in the departure of the United Kingdom from the EU.

The Commission proposals

On 2 May 2018, the Commission adopted the legislative proposals on the 2021-2027 MFF, on own resources to finance the EU budget, and on linking the EU budget with the rule of law. The proposals were followed by a series of further legislative proposals for new and continued spending programmes and funds under the next MFF (see Figure 1).

Within the new structure of the 2021-2027 MFF headings and simplified architecture of programmes, the Commission presented, in its own words, 'a modern budget for a Union that protects, empowers and defends'. Overall, the proposal totals €1 134 583 million (in commitments, 2018 prices; see Figure 2), equivalent to 1.11 % of the EU-27 gross national income (GNI). In comparison with the current MFF, the Commission proposes to give more funding for research and innovation, the digital economy, security and defence, migration and border management, external action, climate, as well as for programmes supporting young people. The list of programmes and funds significantly strengthened includes for instance: Erasmus+ (+92 %), Horizon Europe (currently Horizon 2020, +29 %), LIFE Programme (+50 %), Asylum and Migration Fund (+36 %), the Integrated Border Management Fund (+197 %), Internal Security Fund (+84 %). At the same time, the Commission reduced the allocations for cohesion funds (-10 %) and the common agricultural policy (-15 %). Instruments outside the MFF have generally been boosted and the rules adapted to afford the EU more flexibility within its seven-year financial plan.

Changes were also envisaged on the revenue side, including modernisation of the current own-resources system and a basket of new resources explicitly linked to EU policies. Furthermore, the Commission has taken the political opportunity presented by Brexit to propose a gradual phasing-out of most of the correction mechanisms that discount certain Member States' contributions to the EU budget.

The Parliament's position

The Parliament presented its expectations on the post-2020 MFF and reform of own resources on 14 March 2018, and its first reaction after the publication of the Commission's proposals on 30 May 2018. The EPRS in-depth analysis of the Commission's proposals and comparison with the EP's position shows that they broadly coincide when it comes to the areas in need of additional funding, enhancing the flexibility of the MFF (particularly the proposals to create a Union Reserve and to increase the amounts budgeted for special instruments), and reforming the EU's system of

own resources. However, the overall size of the MFF proposed by the Commission is significantly less than the 1.3 % EU-27 GNI demanded by the Parliament. Moreover, some of the increases proposed for individual programmes (for instance for Erasmus+, Horizon Europe) are lower than called for by Parliament and there is a disagreement about the proposed cuts in cohesion and agriculture policies. Last but not least, the EP intends to closely examine the proposal on protection of the EU's budget in case of breaches of the rule of law.

The negotiation process

The process of negotiating the 2021-2027 MFF and the own resources began formally with the Commission's publication of proposals. There are differences in the legislative procedure for the two elements of the package: whereas Council consults the European Parliament before adopting own-resources decisions, it must obtain the Parliament's consent before adopting MFF regulations. Parliament has made clear that it intends to negotiate both the expenditure and revenue sides of the MFF as a single package.
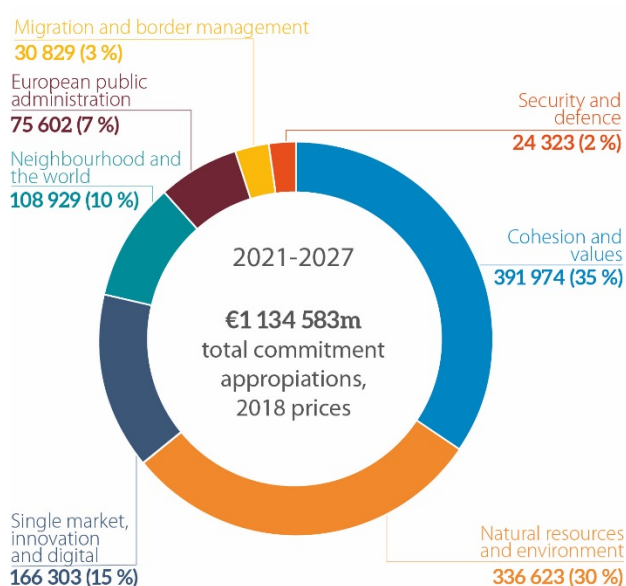
Both Parliament and the Commission have signalled that they are ready to make an effort to reach agreement on the package within one year, before the May 2019 European elections. Meeting this deadline would help allow the new programmes to start on 1 January 2021, and avoid the delays that hindered the implementation of previous financial frameworks. However, European Council meetings have not brought any clarity regarding the calendar. For now, the Parliament is sticking to its ambitious timeframe and plans to prepare an interim report on the MFF package in the autumn.

Figure 1 – Commission proposal for the 2021-2027 MFF, individual programmes as share of total (commitments, 2018 prices).
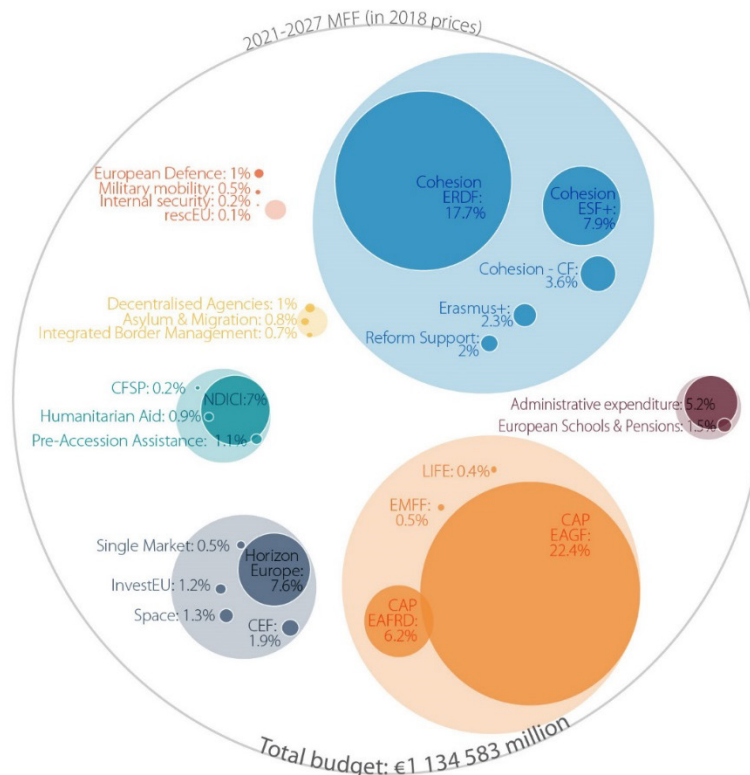
Source: EPRS, 2021-2027 multiannual financial framework and new own resources, July 2018, based on Secretariat of the Committee on Budgets, European Parliament.

Figure 2 – Proposal for 2021-2027 MFF (commitments, 2018 prices).

Migration and border management
30 829 (3 %)

European public administration
75 602 (7 %)

Neighbourhood and the world
108 929 (10 %)

Security and defence
24 323 (2 %)

2021-2027

€1 134 583m
total commitment appropiations,
2018 prices

Cohesion and values
391 974 (35 %)

Single market, innovation and digital
166 303 (15 %)

Natural resources and environment
336 623 (30 %)

Source: EPRS, 2021-2027 multiannual financial framework and new own resources, July 2018, based on Secretariat of the Committee on Budgets, European Parliament.

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As the European Commission approaches the last full year of its five-year mandate, this publication provides an up-to-date overview of the state of play in the delivery of the various legislative and other political initiatives flowing from the ten priorities defined by the Commission's President, Jean-Claude Juncker, on taking office in 2014.

The paper is intended both to assess the progress towards the targets that the Commission has set itself, and to identify areas in which difficulties have been, or are being, encountered, as the EU institutions prepare for the 2019 European Parliament elections.

The analysis – part of an on-going series throughout the Commission's five-year term – finds that, so far, 89 per cent of the proposals envisaged by the Commission have been tabled, and 40 per cent have been adopted. Of the 49 per cent proposed but not yet adopted, around two-thirds are progressing well through the EU legislative process.