



ARTICLE

Forecasting Europe 2023

How will the EU affect the Netherlands in 2023?

Februari 2023

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Forecasting 2023: a greener, more digital and more self-sufficient Europe

Any *forecast* is an attempt to predict future events. And, by definition, that means uncertainty. To see that, we just need to look back at the year now drawing to a close, which was another turbulent year for Europe.

The past year was one when Europe managed, not entirely unexpectedly, to get a grip on the COVID-19 pandemic and also worked hard to implement the corona recovery plans that experts see as having averted a major financial crisis in the EU. But at the same time the EU and others were caught off guard by Russia's invasion of Ukraine in February 2022. This war in Europe has caused a huge humanitarian and refugee crisis. But while almost all EU member states have responded by providing massive levels of support, the conflict has also made it all too clear that the EU is going to have to boost its defences. On top of that, the conflict has been one of the factors triggering an unparalleled cost of living crisis, with high inflation and soaring gas and electricity prices causing many people great financial problems. And in that respect, too, the EU is aiming to become more self-sufficient and we're seeing momentum for a greener economy.

Berenschot is working hard to anticipate the changes ahead and the more intensive EU collaboration they'll involve, which is something we see as both an opportunity and a necessity. Not least because the EU's impact on the Netherlands is big and growing, and our consultants welcome the chance to advise Dutch organisations on complex European issues. Whether this means identifying opportunities for them to obtain European financing or providing substantive advice on complex EU legislation and regulations, we're always pleased to play a part in achieving a more integrated Europe. That's why we've been working with RAND Europe last year to comprehensively assess the implications of Brexit for the Dutch government. We're also collaborating with partners on a multi-year framework contract with DG REFORM to help various EU member states, and primarily the Netherlands, implement structural reforms.

We expanded our EU programme in line with our ambition to intensify our European capabilities. And we'll be continuing to invest in our team in the coming years and expand the range of Europe-related services we provide. So what does this mean in practice? Going forward, the focus for Berenschot's EU consultants will be on four main topics:

- Energy sector and GHG emission objectives;
- Sustainable mobility;
- Public administration and governance;
- Strategic communications.

These are all areas where Berenschot already has a strong position in the Netherlands, as well as being focal areas for the European Commission. At the same time we'll be continuing to expand our services in defence projects and impact assessments as these are markets where we expect to be able to grow. Tying in with our aim to become a major link between Dutch and European markets and ensure we continue meeting clients' needs, we will also be expanding our EU advisory team in 2023 to include some new creative international roles in Brussels.

Forecasting Europe has traditionally set out our forecasts for the European developments most likely to impact on the Netherlands over the coming year. And this 3rd edition is no exception, even though experience shows that we're living in an era of great and often unpredictable change. This year, we've chosen to focus on four topics in particular, while also discussing various other issues our consultants will be dealing with in 2023.

- Towards an affordable public transport system, Annemijn ten Velde & Max de With
- Participatory governance and communication higher on the EU agenda, Robert Wester & Olivier Morskate
- Safeguarding a socially just energy transition, Joachim Schellekens
- Defence, Security & Space high on Europe's agenda, Ronald Vuijk

Towards an affordable public transport system

The public transport system in the Netherlands is struggling. We see pressure on both the affordability and viability of public transport. Passenger numbers have not returned to pre-pandemic levels and the peak to off-peak ratio has also deteriorated - making operations even more costly. On top of which it is becoming increasingly difficult for public transport to compete with other modes (especially cars) in view of the relatively high costs. This will only worsen in the future, not least due to the growing popularity of the electric car which is cheap (or cheaper) to use. Staff shortages are playing an increasingly more significant role, too.

Nevertheless, we expect a lot of our public transport. In many situations public transport is still a more sustainable solution than an electric or fossil-fuel car, and also needs much less space. However a real improvement in the financial performance of public transport is necessary if both governments and travelers are going to continue to opt for collective transport in the future.

Two possible solutions

There are two possible solutions to keep the costs and price of public transport at an acceptable level: either public transport has to generate more revenue or it has to cost less.

In the area of revenue, efforts could be made to improve turnover by increasing the demand for transport. This could be done by lowering the price and using other budgets, or by making public transport more attractive from the tax perspective. In the latter case, public transport would be taxed differently, hopefully, leading to more commuting and business use.

Savings could also be made in the area of costs - something which is still necessary and useful even if revenue increases. We will consider two examples below in which investment in infrastructure and systems will lead to a more attractive product for the customer and more efficient operations.

Demand side - increasing turnover

Offering a lower price

The German €9 ticket is an excellent example of how public transport can be offered much more cheaply than the cost of a car.¹ During the months of June, July and August passengers could travel on all regional and local trains and buses in Germany for €9 per month. The scheme, financially facilitated by the German government, was created because of the global energy crisis and intended to offer the general public a transport alternative in the context of high energy prices and high inflation. By mid-August almost 40 million tickets had been sold.

Opinions are divided about the success of the experiment, both because the supply was not always sufficient to meet the demand and because only a limited number of passengers indicated that they had taken the train instead of used the car. At the same time, in practice, there are very few examples of mobility measures which have resulted in a modal shift of anything more than a few percent.

Tax benefits

There has been considerable investment in promoting electric cars in recent years given that they are considered to be more sustainable than fossil-fuel powered cars. Even more sustainable than an electric car, however, is public transport, which also makes far more efficient use of the available space. A large proportion of road traffic is made up of daily commuting and business travel, often using a lease car. It is the case at the moment that leasing is generally easier and more advantageous from the tax point of view than travelling by public transport. Promoting the use of electric vehicles through fiscal policy has led to a major transformation of the automotive landscape in the Netherlands; the country with the greatest density of charging stations in Europe.² Fiscal policy could be applied in a similar way to increase public transport use.³

¹ <https://nos.nl/l/2442768>

² <https://www.anwb.nl/auto/elektrisch-rijden/waar-staan-de-oplaadpunten>
(location of charging stations in the Netherlands)

³ <https://www.fd.nl/opinie/1453779/waarom-is-de-lease-auto-nog-steeds-aantrekkelijker-dan-de-trein>

Supply side - cutting costs

Even with more revenue, it remains both necessary and worthwhile to reduce the level of cost in public transport. This can be done in various ways. Both of the examples given below aim to combine a more attractive product for the customer with efficient operations.

Bus Rapid Transit (BRT)

Government bodies, the private sector, civil society organisations and travellers want reliable, affordable and workable solutions that respond in a more targeted manner to the problems of a village, town, city or region and which offer the same or higher standards of quality as existing mobility solutions. Bus Rapid Transit (BRT) is one such innovative solution. BRT is a collective transport system operating buses that drive at a high average speed and with high frequency using dedicated infrastructure. A system which combines reliable journey times with a large passenger capacity, offering comfort, good connections with other transport options and which is recognised by travellers as having all these features. BRT is also sustainable and quiet, due to the use of electric buses.⁴

The cost-cutting effect of BRT lies mainly in the operational efficiency gains that a dedicated infrastructure brings: large numbers of passengers can be carried with a relatively limited fleet and few personnel requirements. In this way the passenger is offered a more attractive travel option, while the carrier and client benefit from a higher level of cost recovery.

Harmonisation and technological innovation in rail transport

2021 was the European Year of Rail, on which we published items on several occasions.^{5, 6} This initiative generated a lot of interest in rail, but also revealed just how much still needs to be done to provide optimum rail connections throughout Europe. The crux of the matter lies in standardisation and technological innovation. Ultimately, both of these can drive down operational costs, both nationally and internationally.

Accelerated implementation of the ERTMS safety system, for example, will eliminate cost-escalating differences between the rolling stock used in different European member states. Standard trains that can be operated throughout Europe with just one safety system will lead to lower costs in both procurement and maintenance. At a time of growing staff shortages, the option of automatic train operation (ATO) - self-driving trains - also offers good prospects. By using both technologies, ultimately more trains can be operated on the same infrastructure and with the deployment of fewer personnel. As with the BRT example, targeted investment in the 'hardware' can lead to lower operating costs across the board.

The foregoing clearly shows that achieving an acceptable level of cost for public transport is a challenge. The value to society of public transport makes it a challenge worth pursuing. Solutions aimed at increasing demand are possible through the use of other budgets or fiscal policy. Real improvements in operating costs can be achieved mainly through targeted investment in infrastructure.

Many of the possible demand and cost-side measures can be addressed by EU member states or regions. EU policy, legislation and funds can be used to set out the future direction and help accelerate progress. Using a combination of supply and demand-side measures in both the shorter and longer term, steps can be taken towards an attractive and affordable public transport system. While the first steps could be taken right now, they will require a long-term strategic focus.

More information? Please contact Annemijn ten Velde via a.tevelde@berenschot.nl.

⁴ For a detailed overview of the benefits and opportunities offered by BRT see our Bus Rapid Transit Manifest: <https://www.rijksoverheid.nl/documenten/rapporten/2022/11/14/manifest-brt>

⁵ <https://www.berenschot.nl/artikelen/forecasting-europe-2022>

⁶ <https://www.berenschot.nl/nieuws/2020-november-naar-een-european-year-of-rail-met-impact>

Participatory governance and communication higher on the EU agenda

“Democratic institutions must constantly gain, and regain, the citizen’s trust” said President of the Commission Ursula von der Leyen in her address on the State of the Union on 14 September 2022. Public organisations throughout Europe are confronted with growing polarisation in society, distrust in public institutions, and complex crises and missions. In order to achieve public consent and to counter low-trust society, stakeholder engagement and civilian participation are crucial.

The OECD concluded in a recent report⁷ on public communication that there is a need to “institutionalise and professionalise communications units to have sufficient capacity, including by embedding the necessary skills and specialisations that are leading the transformation of the field, and ensuring adequate human and financial resources.”

Clearly, communication needs a more strategic and central role in public organisations and communications departments need to become more professional and better resourced. Which is why the steering group of the Club of Venice recently adopted an initiative by Berenschot to establish a European Centre of Expertise for Public Communication.

We asked Vincenzo le Voci, secretary general of the Club of Venice about the importance of the role of communication.⁸

Le Voci: “Communication is crucial in this fragmented world. It needs to be part of policy making. The many crises over the last years have shown the need for professional communication. Without a good narrative people will not be convinced and problems cannot be solved.”

Why does the Club of Venice support the idea of creating a European centre for Public Communication?

“Crises don’t wait. Where national authorities don’t speak to each other regularly, crises can develop very quickly. People get confused and they keep distance from authorities. The fundamentals are an integrated strategy and a reliable structure. Training all communication professionals from Member States and European institutions is essential to refresh skills and to get a more professional team. The centre can help in what to do in urgent situations. It will be a central contact point and many participating organisations, such as academies, universities, specialized companies and NGO’s can be enabled to help.”

The aim of the centre is to give advice on modern strategic communication and participatory governance and to help enhance cooperation between communication units and departments all over Europe.

What do you think of this aim? “We can play a role as a facilitator to improve communication. Everyone must modernize communication to cope with the challenges. Everyone needs to deepen the knowledge for instance on artificial intelligence and digital tools. But we can also help to improve the internal connections between ministries”

What is the main thing this centre should do? “The main thing is problem solving, to really act on actual problems, for instance when a Member State would like to have advice on a current crisis, it will not be an Academy. The Centre needs firstly to work on visibility towards all the different public administrations and will collect best practices and will look in the detailed profiles of the different organisations involved.”

⁷ OECD Report on Public Communication; The Global Context and the Way Forward; December 2021.

⁸ The Club of Venice is an informal network of communications directors throughout Europe. It was founded in 1986 and its purpose is to stimulate and exchange information and experiences with respect to public communication practices.

What are the main themes this new centre should focus on?

“I would say crisis scenarios, counter disinformation and hybrid threats. We need to concentrate on these topics. And of course: capacity, it’s all about organisation. All knowledge must be refreshed and tested. We can learn a lot from each other. It will enhance the cooperation between all organisations involved, throughout Europe. All communications professionals of our organisations need to be ready to engage with professional strategic communication.”

Looking ahead to communications trends

A recent survey⁹ of members of the Club of Venice showed that data-driven strategies, low-trust society and fake news are the issues that they perceive will have greatest impact on their organisations in the near future.

The survey respondents also indicated that they expect an increase in communication activities, budget and size of their teams in the coming years. They are facing rapidly growing demand for communication, not only from their own organisations, but also from society.

This also means that participatory governance should be moved higher up the agenda. That requires investments in *further professionalization* of communications teams throughout Europe.

When participation and communication are on top of mind, the communication professionals should deliver on these important aspects. They really need to become a strategic partner of the management of their organisations in order to advise them on more communicative ways of governance. Especially the use of data and digitisation are crucial in order to respond immediately to voices in society, says Le Voci

Berenschot has taken the lead in the development of this Centre for Public Communication. In 2023 the Centre will make a start with a data base of best practises and will provide an overview of the many organisations that are likely to contribute. Dutch communications professionals will be enabled to learn from the different initiatives in other Member States, the EU institutions and academia and ngo’s. Gradually the Centre will become a knowledge and learning centre at European level.

More information? Please contact Robert Wester via r.wester@berenschot.nl.

Safeguarding a socially just energy transition

1. Introduction

In 2022 the global financial and energy-commodity markets were rocked by the indirect impacts of the invasion of Ukraine by the Russian Federation. In just a few months energy prices in the Netherlands increased tenfold compared to the previous year. In combination with high inflation, this has increased the number of households that are worried about their energy bill and that spend more than 10 percent of their household income on it.

As a consequence, the EU has been forced to rapidly reduce its dependence on Russian fossil fuels and to accelerate its focus on increasing wind and solar production, diversification of suppliers and efficiency. To achieve this the EU has set out a new growth strategy that aims to transform the Union into a fair and prosperous society that will have net-zero greenhouse gas emissions by 2050 and a 55 percent net cut in emissions by 2030. The 'Fit-for-55 package' includes specific proposals to achieve this. One proposal is to create a Social Climate Fund to help EU citizens meet the social and economic costs of the climate and energy transition.

The Fair Energy Transition for All (FETA) project (supported by a consortium of European foundations and led by the King Baudouin Foundation (KBF)) aims to pave the way for a fair energy transition in Europe. We spoke to Sahba Chauhan from the IKEA Foundation, a member of the FETA project, to discuss last year's developments (FETA, energy prices, climate change challenges) and look forward to 2023.

Sahba Chauhan has been a climate action program manager at IKEA Foundation for two years. She leads the execution of the people strategy. This focuses on building consensus on climate action, supports behavioural change and strengthens the case for a truly just transition (see the box below for more information).

The IKEA Foundation

The IKEA Foundation is a strategic philanthropy that focuses its grant-making efforts on tackling the two biggest threats to children's futures: poverty and climate change. It currently grants more than €200 million per year to help improve family incomes and quality of life while protecting the planet from climate change. Since 2009, the IKEA Foundation has granted more than €1.5 billion to create a better future for children and their families.

In 2021 the Board of the IKEA Foundation decided to make an additional €1 billion available over five years to accelerate the reduction of greenhouse gas emissions.

The IKEA Foundation funds Planet and Livelihoods programmes that focus on:

- Climate action. Programmes that not only reduce greenhouse gas emissions but also make an immediate and tangible difference in people's daily lives.
- Emission reduction. Supporting programmes that have the highest impact on reducing greenhouse gas emissions.
- Renewable energy. Focusing on access to renewable energy to avoid new emission growth.
- Green entrepreneurship. Enabling people to earn a decent income while protecting the planet.
- Agricultural livelihoods. Supporting regenerative and circular agriculture programmes, particularly in East Africa and India.
- Refugee livelihoods. Supporting refugees to achieve self-reliance.

2. Fair Energy Transition for All (FETA) project

Q: The IKEA Foundation was one of the financial supporters of the FETA project launched by KBF. Can you indicate the main reasons why the IKEA Foundation was interested in this subject at the time (as it was some years before the current spike in energy prices)?

The EU Green Deal has significant potential to build in a fair transition in Europe's decarbonisation trajectory. However, the current plans pay insufficient attention to the social aspects of the transition, and do not allow for adequate participation by and communication with citizens and workers. This is especially true for highly vulnerable groups.

Without a deep understanding of people's fears, concerns and ambitions, it is hard to develop policies and financial instruments that work in support of a well-managed transition that leaves no one behind.

At the IKEA Foundation, we saw the FETA project as a response to this gap. The project aims to gain a better understanding of the emotions, fears, views and needs of vulnerable people with regards to the energy transition and its current and potential impact on the people's living conditions. Through support for this project we aim to provide input to national and European policy-makers, researchers and stakeholders to help them develop fair energy transition policies and enhance communications with the target group.

Q: What are your key takeaways from the FETA final report?

First of all, the study found that most people want a fair climate transition. They want vulnerable communities to be consulted about decision making. Secondly, participants note that to achieve objectives, the behaviour of consumers should be adjusted. Thirdly, and this one is very important, it is unclear to people how targets will be set and how to keep both big businesses and 'ordinary' people accountable.

The IKEA Foundation takes these findings into account and will continue to support the collective debate to stop polarisation.

3. A socially just energy transition in the Global South

Q: The IKEA Foundation focuses also on addressing energy poverty in the Global South. There's an increase in energy poverty in the Global South: what role does the EU play in this?

Ending energy poverty, like tackling the climate crisis, is a global problem and needs global action. Energy poverty should not be acceptable and should be met with sustainable and renewable energy sources. Dependence on fossil fuels is deepening rather than improving energy poverty.

The IKEA Foundation is supporting energy access in emerging economies, but the need is far higher than we can meet alone or with philanthropic funding. This is where the Global North can play a critical role by transferring the technology and money needed to accelerate renewable energy access.

We should work collectively on developing renewable alternatives that can provide energy to all citizens.

Q: What is the view of the IKEA Foundation regarding 'outsourcing' of emissions to the Global South?

Our argument is that climate policies need to consider the whole planet. Policies that lead to a shift in emissions from one place to another place (with fewer policies in place to curb emissions) are wasteful. Policies by the EU (such as the proposed Carbon Border Adjustment Mechanism) are an example of a type of policy that we support, as it aims to address the global pollution problem.

4. From growth to post-growth

Q: There's a debate about green growth and de-growth, to achieve net-zero. Does IKEA have an opinion about this from a business perspective? **Q:** Does IKEA put this in practice?

While we share a name, founder and the same set of core values, the IKEA Foundation is completely independent from the retail business, so we can't speak on their behalf. We both have a vision to create a better everyday life for many people, and we do know that the IKEA retail business is deeply committed to making their business sustainable and has shared a lot of information on this publicly. So I'd encourage you and your readers to visit their website to learn more.

5. Final remark: Sahba's hopes for the future

In 10 years' time, I hope we will see a new world. We are now far away from our target goals to reduce emissions. In the next decade, humanity must focus on addressing climate change even more than we are currently doing. The IKEA Foundation supports this through making new collaborations and allowing vulnerable citizens to participate in the debate.

Secondly, I hope that we have achieved a 30-to-40 percent reduction in air pollution.

Thirdly, I hope that the Netherlands will encourage training unemployed people and young people in a technical field to solve the labour market gap in sustainability.

More information? Please contact Joachim Schellekens via j.schellekens@berenschot.nl.

Defence, Security & Space high on Europe's agenda

Geopolitical context

We're seeing tensions rising in today's increasingly multipolar world. Russia's invasion of Ukraine in early 2022 sent an unprecedented shockwave through the international legal order and relationships between global powers are also coming under pressure. Europe is supporting Ukraine, and its worsened relationship with Russia is having major economic consequences and putting considerable pressure on relationships with other world powers such as China. Europe has to ensure an appropriate response. The direction of Europe's security and defence policy over the coming years – and specifically its management of crises, its resilience, its capacity development and its approach to partnerships – will be guided by the EU's new Strategic Compass. As Josep Borrell, the EU High Representative for Foreign Policy, puts it, *'Threats are on the rise and the cost of inaction is clear. The Strategic Compass is a guide to action. It sets an ambitious path for our security and defense policy for the next decade. It will help us address our security responsibilities, vis-à-vis our citizens and the rest of the world.'* The European Defence Fund will play a vital role in this. According to Thierry Breton, Commissioner for the Internal Market, *'With the European Defence Fund, Europe has finally acquired a real tool for financing European capabilities. It is a real "game changer"... Today, only 11% of public spending on defence is done jointly, far from the 35% target set by the Member States.'*

Stronger security policy

Brexit and the United States' focus on China are two of the major developments forcing the EU to adopt more effective security policies. But this is nothing new. Indeed, the previous European Commission, led by Jean-Claude Juncker, referred to *'L'Europe Qui Protège'* or, in other words, 'A Europe that protects.' Meanwhile back in 2016, the Global Strategy launched by Federica Mogherini, then High Representative of the European Union, and the European External Action Service (EEAS) showed an increasing awareness of the changing geopolitical reality.

We view the Permanent Structured Cooperation (PESCO) and European Defence Fund (EDF) as important building blocks for promoting European defence cooperation, given that these policy instruments call on Member States to become actively involved.

On top of that, the Coordinated Annual Review on Defence (CARD) facilitates collaboration by enabling Member States to share their defence spending plans so as to promote cohesion, identify shortcomings and overlaps, and achieve greater economies of scale. Discussions are currently focusing on opportunities for joint European procurement as this is an important pre-condition for Europe's strategic autonomy. Wherever possible, therefore, European countries planning new defence investments will procure the same material so that they can undertake joint operations more effectively. As complementary organisations, the EU and NATO are also collaborating closely, as evidenced by their joint declaration setting out their shared vision and explicitly referring to military mobility, cyber security, hybrid threats, counterterrorism, and women and security.

What does this mean for the Netherlands?

The EDF, which is designed to promote research and development in the fields of defence technology and equipment, will substantially boost defence spending in Europe and also, therefore, the Netherlands. The Commission intends this financing instrument to encourage collaboration and integration between Member States and to achieve cost-savings. The fund facilitates cross-border collaboration between EU countries, businesses, research institutes, international organisations and universities. The EUR 8 billion that has been designated for this fund from the EU budget for 2021-2027 will encourage countries, businesses and knowledge and research institutes to pursue cross-border cooperation in their ecosystems. And this is something the Netherlands, too, can benefit from.

Societal impact

René Berkvens is a former CEO of the Damen Group and now chairs SEA Europe (the Shipyard's and Maritime Equipment Association). While he points out that uncertainty and lengthy procedures are an issue for manufacturing industries, he also sees positive opportunities in the context of the Green Deal. For instance, defence industry competitors can work together effectively in pre-competitive research and innovation. Sea Defence is a good example of a successful project in the context of the European Defence Fund. René underlines the need to influence policy in Brussels both to reinforce Europe's strategic economy and to take policy steps that promote a level playing field for the European shipyard industry.

Recent Berenschot research in the Netherlands showed that Europe spent a total of EUR 119 billion in the defence industry, with the Netherlands having a 4.5% share of total defence exports within Europe. But we would also note that the huge rise in defence spending means more than just extra money for defence. According to the European Commission president Ursula von der Leyen, who is seeking to achieve greater cross-pollination between the civil, defence and space industries, *'One of the most important and long-lasting innovations in the automobile industry originates from the defence industry, here in Europe. After working on ejector seats in fighter jets for a European aeronautics company, a Swedish mechanical engineer went on to design a new seat belt for a European car company. Inspired by the harness jet pilots used, the three-point seat belt became a global standard in the car industry and has saved more than one million lives since its introduction.'* Defence investments' impact on society thus extend beyond security as they also promote entrepreneurial activity, employment, research, knowledge and innovation in almost all business and industrial sectors. Thanks to the EU's chosen financing method, these investments will also, therefore, help to achieve greater European cohesion, collaboration and knowledge-sharing.

Berenschot is keen to contribute to these efforts to increase European autonomy, both in defence and industry and from a wider societal perspective, through its research, analysis and advice in Brussels and the Netherlands, and also by encouraging Dutch SME businesses to play their part.

More information? Please contact Ronald Vuijk via r.vuijk@berenschot.nl.

Authors



Robert Wester is managing director of Berenschot EU. With his team he works to expand Berenschot's European services. Robert also works on communication issues on behalf of Dutch and European organisations and institutions.

If you have any questions, please contact Robert via r.wester@berenschot.nl.



Joachim Schellekens is a senior consultant at Berenschot. He is an expert on the energy transition and the related socio-economic and technical challenges issues. He closely follows European developments relating to the Green Deal and hydrogen.

If you have any questions, please contact Joachim via j.schellekens@berenschot.nl.



Annemijn te Velde is a consultant at Berenschot. Her focus is on sustainable mobility in a national and European context.

If you have any questions, please contact Annemijn via a.tevelde@berenschot.nl.



Max de With is a junior consultant at Berenschot. His focus is on sustainable mobility in a national and European context.

If you have any questions, please contact Max via m.dewith@berenschot.nl.



Ronald Vuijk is an associate consultant at Berenschot and expert in EU Defense, Security and Space.

If you have any questions, please contact Ronald via r.vuijk@berenschot.nl.



Mission statement

The Berenschot EU team offers a range of consultancy services towards the European Union and Dutch clients who wish to spread their wings in Europe. Our aim is to live up to our excellent reputation in the Netherlands, for example in the field of participative governance and energy transition, at the European level as well, and to help clients tackle major social challenges.

We particularly focus on the following fields:

- Communication
- Energy transition
- Mobility
- Participative governance
- Public Administration & Governance

Berenschot Groep B.V.

Van Deventerlaan 31-51, 3528 AG Utrecht

Postbus 8039, 3503 RA Utrecht

030 2 916 916

www.berenschot.nl