

## ABOUT ESPAS

The European Strategy and Policy Analysis System (ESPAS) provides a **framework for cooperation and consultation** at administrative level, on a voluntary basis, between the European Parliament, the Council of the European Union, the European Commission and the European External Action Service, with the European Economic and Social Committee, the Committee of the Regions, the European Investment Bank and the European Union Institute for Security Studies as observers, to work together on medium and long-term trends facing or relating to the European Union.

**MEGA-TRENDS** are those developments already underway and nearly impossible to change over the coming decade. Inevitably, all the subsequent possible futures will be framed by these trends. These are irreversible certainties that we have.

**CATALYSTS** are trends that, while identifiable, have higher degrees of uncertainty because they move faster than mega-trends. Like their namesake from chemistry, these trends are agents of change which can accelerate or decelerate other trends. They are uncertain certainties.

Taken together, mega-trends and catalysts drive the future in a certain direction. But ultimately 2030 will depend on the decisions humans take *in the present*. These are the **GAME-CHANGERS** that will determine the future, and yet they have the lowest degree of certainty.

# GLOBAL TRENDS TO 2030 CHALLENGES AND CHOICES FOR EUROPE

### INSTITUTIONAL PARTNERS



European Parliament



Council of the European Union



European Commission



European External Action Service

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European Economic and Social Committee



European Committee of the Regions



European Investment Bank



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# A ROADMAP TO THE FUTURE

## WELCOME TO 2030 THE MEGA-TRENDS

**CLIMATE CHANGE** Due to an increase in temperature of 1.5 degrees compared to pre-industrial times, we will incur economic and environmental damage.

**DEMOGRAPHY** Both Europe and Africa face demographic challenges: while we will need to manage an ageing population, our southern neighbours will need to manage a significant youth bulge.

**URBANISATION** Two-thirds of people will live in small-to medium-sized cities – where this is not managed properly, it will lead to crime, pollution and violence.

**ECONOMIC GROWTH** China will be the first global economy, and Europe will be third – but our purchasing power per head will be almost four times higher.

**ENERGY CONSUMPTION** Energy consumption will increase globally by 1.7% per year – most of this will take place in rising economies, and therefore contribute to even more emissions.

**CONNECTIVITY** The number of devices connected to the internet will have increased five-fold to 125 billion, and the amount of air passengers will nearly double. Everything humans do, good and bad, will be amplified.

**GEOPOLITICS** The world will exit the unipolar system and enter one comprised of 'influence nodes'.

## ON THE ROAD TO THE FUTURE THE CATALYSTS

**INTERNATIONAL TRADE** will increase, irrespective of the decisions of the United States.

**FOOD AND WATER** scarcity will not cause wars themselves but where they appear, they indicate that there is a governance issue.

**CONFLICT** will remain territorial and intra-state in the Middle East and Africa, but it will become hybrid and highly technological in Europe.

**TERRORISM** will continue to be an issue for Europe as recruitment has not ceased and ideological motivation remains.

As **TECHNOLOGY** leaps forward, machine intelligence will begin to rival human intelligence.

**MIGRATION** to Europe will ebb and flow, but it will not disappear.

**POPULIST PARTIES** will continue to be part of our landscape until key issues are addressed.

## TIME TO DECIDE THE GAME-CHANGERS

**SAVING THE PLANET:** if we do not keep temperature increases below 1.5 degrees, we risk heading towards extinction later this century.

**IMPROVE AGEING:** if we age better we can mitigate declining birth rates.

**MANAGE NEW TECHNOLOGIES:** if we do not develop a European approach to them, China and the United States will do it without us.

**POSITION EUROPE IN THE WORLD:** if Europe wants to be an influential player in the poly-nodal world, it will have to change the way it thinks about defence, diplomacy and itself.

**MANAGE CONFLICT:** wars will break out despite our best wishes and efforts, and we will have no choice but to handle them.

**PROTECT DEMOCRACY:** future-proofing measures are necessary if our political systems are to survive.

**ENCOURAGE EQUALITY:** reducing significant differences in income and tackling social exclusion will reduce the potential vote pool for populists and increase societal satisfaction.