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.

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.
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.