Baltic Sea Region in light of European Territory 2050 Scenarios
Based on presentation provided to Ministers responsible for Territorial Cohesion in Luxembourg 26 November 2015

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ET2050 Goal

*From Project Specifications:*

The 31 countries in the ESPON Monitoring Committee, have decided a vision-building process for the European territory with 2050 as time horizon *that involves relevant stakeholders at European, national and regional level.*
Information about ET 2050 project

• Two horizons 2030 and 2050
• Baseline scenario and three territorial scenarios: (A) market based growth favoring large metropoles; (B) Public policies promoting secondary city networks and (C) Local and European initiatives promoting small cities and less development regions
• For Baltic Sea Region countries and regions the most promising scenario B
ET2050 Consortium
Present:
- Situation Analyses

Towards 2030 and 2050:
- Base line Scenario
- 3 Territorial Scenarios

In 2050:
- Territorial Vision

Moving from 2010 to 2050:
- Policy pathways
Territorial Scenario A: Promotion of Metropolises

Promotion and networking of European metropolises towards 2050

• Europe 2020 strategy and global competitiveness

• Largest metropolitan regions of global importance.

• Connectivity to international networks and agglomeration economies

• Investment in 76 Metropolitan European Growth Areas (MEGAs): High-level R&D; long-distance infrastructure networks and global gateways; integrated transnational economic zones.
Territorial Scenario B: Promotion of Second Tier Cities

Promotion and networking of cities towards 2050:

- *Europe 2020 strategy with TA 2020*
- National and major regional capitals.
- Balanced polycentric urban systems at macro-regional and national scale.
- Investments in 261 cities of European or national significance: Cohesion and Structural Funds mostly targeting cities; urban investments in renewal/re-urbanisation, R&D, and regional/inter-regional transport networks.
Territorial Scenario C: Promotion of Smaller Cities/lagging Regions

Promotion of small-medium cities and less developed regions towards 2050:

• Europe 2020 strategy and TA 2020.
• Small- and medium-sized cities as centers of resilient regions.
• Social and economic balance at the regional level; place-based approach.
• Investments: Cohesion and Structural Funds mostly targeting rural less developed areas; local and regional transport networks
• Decentralization to local-regional level
Comparing territorial scenario A, B and C

Towards 2030, scenario B is the most expansionary in terms of GDP.

→ Baseline: + 1.9%
→ Scenario A: + 2.2%
→ Scenario B: + 2.3%
→ Scenario C: + 1.8%

• B: Highest levels of territorial cohesion and competitiveness.
• Regional divergence is only marginally reduced.

Towards 2050, European economic growth is not significantly affected by the promotion of any of the 3 territorial scenarios

• A polycentric and balanced European territory: a possible policy option for a long-term territorial vision.
• Evolutionary process: gradually unleashing growth potential deliver highest overall economic growth with least environmental impact, transport and energy demand.
Possible evolution of the European Territory - 2020
Possible evolution of the European Territory - **2030**
Possible evolution of the European Territory - 2050
Making Europe Open and Polycentric

Open:
• Connecting Europe globally
• Promoting co-development with neighbourhood regions

Polycentric:
• Unleashing regional diversity and endogenous development as a mean to reduce regional disparities
• Supporting a balanced urban structure
• Sustainable management of resources
From fragmented to integrated European Vision?
GDP Growth 2010-2030 (Baseline) by MASST3

GDP Growth annual average rate (Units: %)
Results obtained by MASST3 forecast model
- < 0%
- 0% - 0.5%
- 0.5% - 1%
- 1% - 1.5%
- 1.5% - 2%
- > 2%

GDP a.a.: 1.89 %
45 regions bellow 1.00 %
Employment grows at a sustained rate in Europe, meaning that large part of the recovery from the crisis comes from job creation and lower salaries, instead of productivity gains. (ESPON Space annual average employment growth rate 1.99%) MAST3 is an econometric, macroeconomic, sectoral, social and territorial model. It has been upgraded to explicitly take into account the impact of the current economic crisis.
Population Change 2010-2030 by MULTIPOLES

Total Population 2010 - 2030 (Baseline)
Measured as annual population change

Annual population change (Units: %)
Results obtained by MULTIPOLES forecast model

- < -0.5%
- -0.5% - 0%
- 0% - 0.5%
- 0.5% - 1%
- > 1%
- No data (ESPON space)
- No data (No ESPON space)

Population: from 514 to 530 mln

European population growth will tend towards stabilisation. Total population (ESPON Space) will grow from 514 million to 530 million in 2030.

MULTIPOLES is a cohort-component population dynamics model. It is used for the simulations of complex hierarchical multiregional, multi-country population systems, for analysing impact of various scenarios concerning migration, fertility, and mortality.
Global Accessibility 2010 - 2030 (Baseline)

Measured as potential intercontinental airplane seats and containers in relation EU average

Passengers and Freight Global Accessibility
- Passengers and Freight accessibility are expected to increase below EU average
- Passengers accessibility is expected to increase over EU average
- Freight accessibility is expected to increase over EU average
- Passengers and Freight accessibility are expected to increase over EU average
- No data (ESPON space)
- No data (No ESPON space)

Global accessibility will increase around transport nodes: intercontinental airports and freight ports.
Thank you for your attention

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