



The Future of the European Union in a Changing World

UNDP Strategy & Futures Team

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KEY DRIVERS OF MULTILATERAL CHANGE

Identified from **UNDP's 2026 Landscape of Development Update**, which reviews the latest changes across 12 areas of global development – and highlights what to watch in the coming year.

Multilateralism off the rails

International solidarity fragments

Conflict cascades

Hot, cold, and new forms of war and violence on the rise

From dependency to investment

National budget priorities shifting away from traditional aid

Managed mobility

Migration – driven by many causes – is increasingly politicized

Earth's bottom line

Planetary boundaries overshoot as competition for resources intensifies

Energy cross-currents

Renewables are growing, but not yet fast enough

Digital sovereignty

Nations seek to control technology, infrastructure, identity, and ideas

Debt dilemma

National debts balloon, and crowd out development

Green money, grey areas

Sustainable finance incentives hold contradictions as well as promise

Gender equality under fire

Gender equality is far off track and under pressure

Uneven pathways to prosperity

Fragility and poverty are inseparable as development diverges

Age of distrust

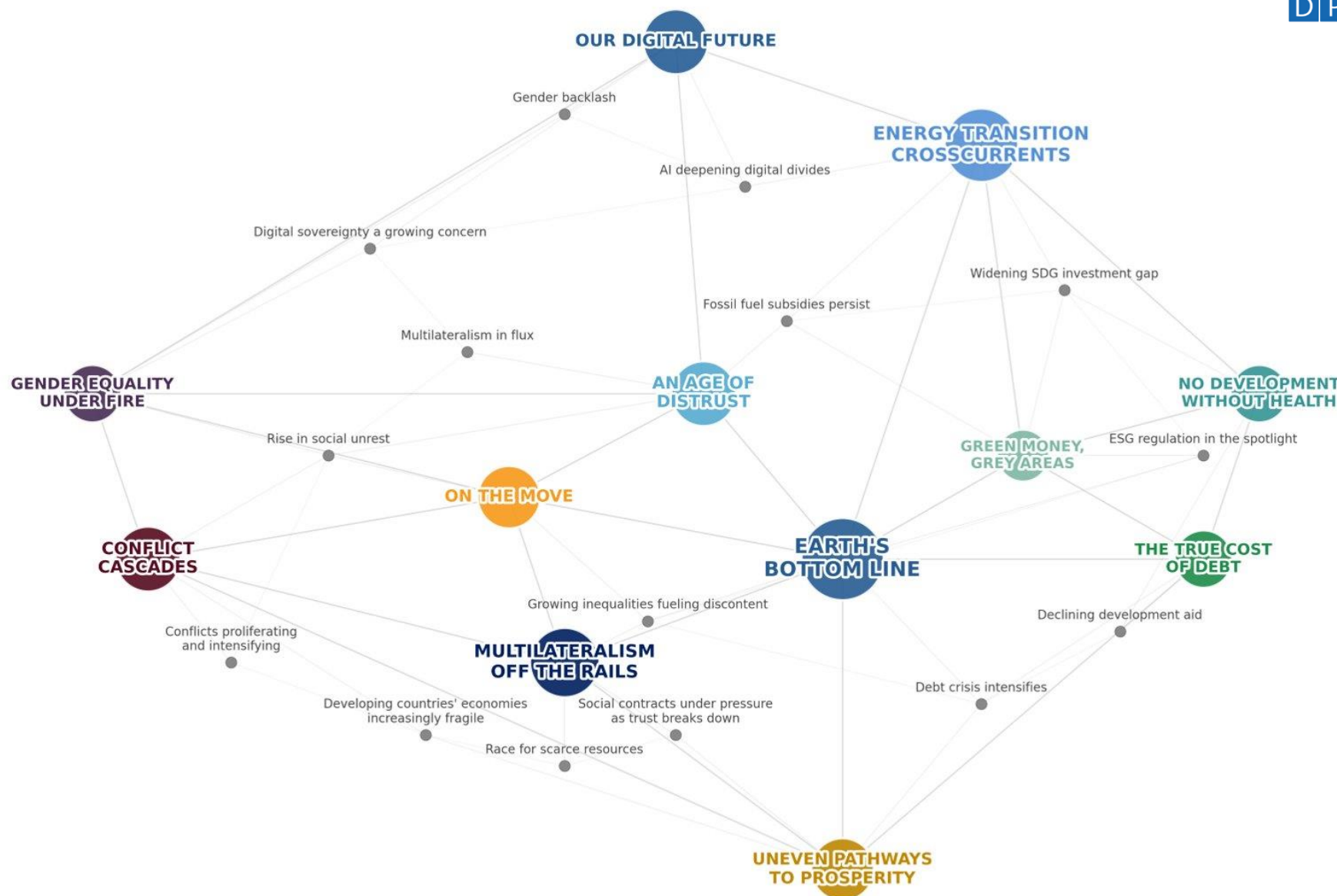
Trust is breaking down and grievance moves us inwards

INTER-CONNECTED DRIVERS OF CHANGE

The intersecting nature of global trends – where each amplifies and transforms others – requires us to think and act systemically.

We can no longer address challenges in isolation.

Instead, we must pursue foresighted integrated solutions that recognize how environmental, social and technological developments compound and accelerate one another.



THE LANDSCAPE OF DEVELOPMENT



The global development landscape, while challenging, is full of possibility

UNEVEN PATHWAYS TO PROSPERITY

Over 130 countries have now started calculating their national finance gap and drafting a national Biodiversity Finance Plan.

Investing in nature and ecosystems could unlock \$10 trillion in business value and 395 million jobs by 2030.

CONFLICT CASCADES

The global economic impact of violence reached \$20 trillion (12% of global GDP) in 2024.

Every \$1 invested in prevention— in economic stability, and strong institutions—can save between \$26 and \$103 in possible conflict-related costs.

DIGITAL SOVEREIGNTY

One quarter of humanity (2.2 billion people) remains offline in 2025 – most of them women.

Closing the gender digital divide could unlock \$1.5 trillion in lost GDP by 2030.

DEBT DILEMMA

3.4 billion people live in developing nations where governments spend more on debt service interest payments than on health or education.

Yet, \$1 invested in women's health yields \$3 in economic growth.



UNDP STRATEGIC PLAN 2026-2029



UNDP works with countries to **expand people's choices for a fairer, sustainable future, as envisioned by the 2030 Agenda and SDGs.**



LOOKING AHEAD



Europe has been the anchor of rules-based cooperation in a world in crisis.
In this moment of multilateralism in flux, the EU can lead the future by:

Investing in what works

Flexible funding that allows rapid response in complex settings

Holding the line

On development investment when others are retreating

Championing integrated approaches

Fragility, climate, conflict and poverty are interconnected and must be addressed together

Thank you