European Commission

Foresight on Demand (FoD) Impact of the COVID-19 pandemic on European Consumer Behaviour - Foresight Study

Foresight study on consumer behaviour - Final repor

Final Report

SERVICES TO SUPPORT DG JUSTICE AND CONSUMERS, UNIT B.1 CONSUMER POLICY AND SUSTAINABILITY
UNDER THE FRAMEWORK CONTRACT 2018/RTD/A2/PP-07001-2018 - LOT1

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Justice
And Consumers

EUROPEAN COMMISSION

Directorate-General for Justice and Consumers
Directorate B – Consumers
Unit B.1 — Consumer Policy and Sustainability

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Abbreviations

EC	European Commission
FoD	Foresight on Demand
QR code	Quick Response code
DG ENV	Directorate-General for Environment of the European Commission
DG SANTE	Directorate-General for Health and Food Safety of the European Commission
DG JUST	Directorate-General for Justice and Consumers of the European Commission
DG DIGIT	Directorate-General for Informatics of the European Commission
GDPR	General Data Protection Regulation
DG RTD	Directorate-General for Research and Innovation of the European Commission
DG CNECT	Directorate-General for Communications Networks, Content and Technology of the European Commission
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs of the EC
DG EMPL	Directorate-General for Employment, Social Affairs and Inclusion of the European Commission
EIT Food	European Institute of Innovation and Technology for Food
SME	Small and Medium sized Enterprise
STEEPV	Societal, technological, economic, environmental, political and value-related trends
CE-legislation	Conformité Européenne legislation
MS level	Member State level

Executive Summary

This foresight study's purpose was to anticipate future challenges for consumer policy in the context of the twin transition and the short- and long-termed impacts of the COVID-19 pandemic on consumer behaviour, consumption patterns and markets in Europe with a time horizon of 2025 to 2030.

In order to find answers to the complex questions of uncertain future developments the foresight team combined several approaches of foresight for anticipatory governance. This includes a systematic horizon scanning of existing reports for weak signals of change in all fields of society such as societal developments, technology, economy, environment, policy and values. The literature and data based information collection was combined with explorative exercises like a scenario development, a visioning process and a gap analysis to develop new ideas for policy options. The engagement of stakeholders and experts on consumer policy was crucial throughout the whole process, in particular for the analysis of influencing factors, alternative scenarios and suggestions for policy actions.

With its anticipatory and exploratory nature, the study was a pilot project for the implementation of comprehensive strategic foresight in DG JUST. Accordingly, the project was also used to build capacity for foresight in dealing with future uncertainty. Representatives of several departments of the DG actively participated in the workshops in all four steps of the process and thus got to know and tested the methods of foresight. These include participatory and qualitative foresight methods such as horizon scanning and scoping for identifying key future trends, scenario and vision development for exploring different possible futures and identifying challenges, and roadmapping approaches for developing options for action. Another important element of the study was the intensive involvement of stakeholders in all steps of the process, especially in the development and discussion of future scenarios and in the development of new policy ideas.

The DG can use the various results of the Foresight process for the further future-proof implementation of the New Consumer Agenda. The **trends** examined for the scenarios can be reviewed at regular intervals with regard to new developments and impacts on consumption and consumer protection. The **scenarios** provide an overview of possible futures of consumption in Europe after the COVID-19 pandemic and serve for exploring the scope of possible developments. The **visions** for consumer protection and empowerment, especially of vulnerable groups and consumers with special needs, summarise stakeholders' expectations for consumer policy in the next 10 years. The **action fields** prioritised together with stakeholders for consumer policy in and after the pandemic and the **ideas for policy actions** can now be used by the EC to set its own priorities and develop ideas into concrete actions. The EC may not want to take up all the ideas presented here, but the suggestions can provide guidance on which issues are of high importance from a stakeholder perspective in the COVID-19 crisis.

Trends and drivers for consumption after the pandemic

The horizon scanning's trend analyses have revealed how European citizen's lives are impacted by the pandemic in many ways. Key areas of activities such as work and study, travel and mobility, entertainment, health, food and physical activities were examined and 29 trends in relation to the COVID-19 pandemic impacts on consumption were identified. Eleven key trends with yet unclear effects were used to develop the four scenarios.

One of the most important impacts of the still ongoing COVID-19 pandemic on consumer behaviour is the massive increase in online activities and shopping – from groceries to clothes, sports equipment and bicycles to streaming music and movies and related shifts in activity patterns such as mobility, tourism or remote work from home. Therefore, it is not surprising that most of the policy ideas proposed have to do with online activities in one way or another. The opportunities and risks of online activities for consumers are already in focus of the EC consumer policy, but the dimensions of the risks have greatly expanded because of the pandemic. Consumer protection must therefore focus even more on online shopping and other online activities in the future in order to identify and reduce the risks in the virtual and real world of shopping and consumption at an early stage. The risks relate to people's vulnerability, especially in terms of physical and mental health, income and social participation, as well as privacy, data protection and freedom of choice in consumption.

Scenarios for the future of consumption after the pandemic

The risks for consumers resulting from increased online activities because of the pandemic are in tension with the trends and drivers of the two major transformations of society: digitalisation and the sustainability transition. The twin transition continues and will do so in the upcoming 10 years, despite the COVID-19 pandemic, which is affecting Europe longer than expected at the beginning. Moreover, the transition is being greatly accelerated by the pandemic as people and organisations make use of digital tools and platforms to continue their activities despite the lockdowns. Consequently, the goal of making digitalisation sustainable in Europe remains important and must be pursued even more strongly in view of the acceleration of online activities.

Another important effect of the pandemic is that many people have become more aware of the connection between consumption and environmental pollution and climate change. They have experienced the effects of less traffic on air quality and wild life in public parks or the increase of packaging waste due to food delivery and online shopping. In this context, the trend analysis has shown that two emerging types of consumers related to the twin transition will continue to shape the future of consumption:

- The *responsible consumer* who limits consumption for the sake of the environment, and
- The "*tech optimist*" consumer who does not want to limit consumption despite the environmental impact and instead relies on (digital) technical solutions.

How strong their respective influence on future consumption will be cannot be determined at present. The scenarios show different variants of this and how consumption as a whole will change as a result.

It is important to note that the scenarios are not forecasts. The qualitative exploration of futures with scenarios strive to account for possibilities that might not be possible to model, but can be approached through rigorous imagination. Therefore, the study used a scenario development process specifically designed to facilitate the identification of future challenges and opportunities across various scenarios and thus helps make consumer policy decisions more future-proof.

The four scenarios developed in the study outline four different development paths for consumer behaviour in the EU. None of them is a simple continuation of current developments; instead, the shock of the pandemic is taken into account. There are relevant changes compared to today, each of which is the result of the interaction of individual key influencing factors.

Scenario "United for a more sustainable, inclusive and resilient society"

This scenario is characterised by setting the securing of a fair income to support people in critical situations and fighting poverty as top priority across the EU Member States. In order to speed up the sustainable energy transition, taxes, incentives and grants are widely accepted in 2030. Diverse policies to protect private data are in place. The positive development of the markets after the pandemic is accompanied by a recovery of the labour market. Remote work is common in well-paid, knowledge-intensive jobs. After the experiences of social isolation and distancing during the lockdowns, today in 2030, social cohesion is high; being not only digitally but also socially connected is very important. Young people are drivers for the shift of values towards inclusion and empowerment. For many consumers, status symbols are sustainable products and practices.

In this scenario, the COVID-19 pandemic has strengthened social solidarity across Europe in the long term by making many people aware of their own vulnerability and of the fact that crises can only be resolved in cooperation within society and between societies. In 2030, these ideas have led to the reduction of wide disparities in income levels across the EU, as the support for initiatives tackling inequalities in access to digital services, education/reskilling, and health care at Member State level reached soaring levels. As many activities have remained online even after the COVID-19 pandemic, the up-take of online activities in the early 2020s was a real "wake-up call" for digital consumer rights protection and sustainable consumption in the digital society. The combination of industrial investments into the digital transformation, changes in consumer behaviour and how vulnerable groups were affected by the crisis made all the difference.

Scenario "Inequalities and green growth"

In 2030, the economic inequalities are exacerbated and unemployment rates among the EU Member States are constantly high. In consequence, poverty has increased. Affordable housing is a major issue, not only in cities and metropolitan areas. Due to the bad economic situation, political tensions between European Member States are growing. For citizens, the personalised consumer experience and prices are widespread. Sustainable consumption is not of highest priority for all. A trend for responsible living and consumption is emerging, mainly driven by young people. Yet, the "technological optimists", representing the majority of consumers, are not willing to change their consumption level drastically, and tensions are growing between these two groups.

In this scenario, the economy in many Member States has not recovered properly even 10 years after the outbreak of the pandemic. This development has hit the economically weaker states far harder than the other states that had prosperous economies before 2020. The main reason is that the vaccination rates were too low in most Member States, even after a second and third winter with lockdowns and curfews for those not recovered or vaccinated. While a large proportion of consumers continued to shop almost exclusively online after the first lockdowns, there are people in marginalised social groups who have not been able to embrace this change for a variety of reasons. The openness to data sharing for health, safety, and other communal reasons since the rise of online activities to overcome the lockdowns, are transferred to data sharing across many other contexts. The pandemic affected tourism in the EU: Self-organised camping holidays are mainstream in 2030, and the number of people spending holidays in their own region is still high. The economic consequences of COVID-19, especially the global supply-chain interruptions, reduced opportunities to buy sustainable products due to income, and the negative effects of online retail on energy consumption and CO_2-emissions, have hindered the achievement of the EU's climate goals. Many citizens could not afford pricier sustainable products, although available in most grocery stores, online and offline. The inequalities across the Member States and the different fiscal strategies to catch-up contributed to the political tensions between the countries. As a result, solidarity among citizens within the countries and among the Member States is waning. Again, some Member States are threatening to leave the EU, in particular those with an influx of populist parties due to income inequalities, effects of vaccination scepticism, declining trust in governments and xenophobia.

Scenario: Mitigated inequalities and green technology

In 2030, many EU Member States have successfully mitigated the inequality increase after the pandemic. Green growth is a successful concept in many sectors, green innovation and green-tech made in Europe are booming. Overall employment is rising, but the structural change towards a digitalised economy also causes job losses in some traditional branches as well as in rural areas. At the same time, many of the rural areas, which were at risk of being depopulated at the early 2020s, are now revitalised through digital infrastructures and attract young families and people who aim for a responsible and sustainable lifestyle while earning a living through remote work. "Fairness by design" and strict data protection regulations for platforms are implemented to protect consumers across the Member States. Consumption is high, yet sustainable consumption is not a priority for all.

In this scenario, the experience of the pandemic has pushed anticipatory governance in support of the twin transitions. The policy measures around and quickly after the fast uptake of the digital economy, in particular digital consumer rights for European online platforms was a catalyst for the green transition and innovative business models to support the economic recovery in the Member States. Several laws and regulations for climate neutral technologies, products and business practices were introduced successfully across the EU economies. Yet, it takes some effort and time to negotiate the measures and regulations for climate-neutrality in all sectors between the Member States. Furthermore, several EU countries started political measures such as basic income to protect vulnerable groups during the difficult post-pandemic times. Most of these programmes led to less income inequality and higher disposable income for a large share of the population, compared to the situation in the early 2020s. A framework programme against misinformation with its national centres is successful. It has been established as a response to the populist media activities during the pandemic in order to balance media and social media posts for information and to protect citizens from misinformation.

Scenario: Inequality to the breaking point

In 2030, income inequalities in all Member States significantly increased the social division between wealthy households and those struggling with no or little income is at the highest rate since decades. Most economic systems in the EU focus on GDP-growth. Only very few countries are on their way to implement a post-growth-oriented economic system, which they have started to experiment with during or right after the COVID-19 pandemic. For the rest of the countries, post-growth ideas like frugal consumption were just a hype. Climate change causes a lot of irreversible damage, bringing the social welfare systems of national economies to its limit. Many citizens are working, learning, getting entertained and interacting with others online in augmented realities. They use digital twins of their life, provided by global platform companies. This has led to a data capitalism without any real guarantee of data protection and privacy for citizens. The level of consumption among European citizens is high and a key factor for their social identity. Most consumers believe that they can achieve the sustainability goals only with the help of innovative technologies; the tech-optimists are trendsetters in consumer behaviour.

In this scenario of 2030, the post-pandemic struggles and the increase of natural disasters have strong effects on the entire economic situation in Europe. Despite attempts to counter this with policies, many European citizens live in poverty. The costs for the Member States to bridge the gap between rich and poor citizens or to limit the immense inflation since the pandemic in 2030 are too high, public debts are rising and limit the financial possibilities for welfare programmes. The attempts to achieve the sustainability transition seems to have died down in the Member States, simply because economic and social inequalities are of higher priority. The lockdowns and restrictions during the COVID-19 crisis have boosted online shopping, education, and work in 2030. Consumption is high and there is a strong demand for sustainable products and services, as long as they can be purchased online for those who can afford it. In 2030, people realise that the COVID-19 crisis leaves a "lost generation": The children and adolescents that experienced the restrictions and lockdowns from 2020 to 2022, in some countries due to vaccination refuse even until mid-2020, are suffering from the poor education during home schooling and of limited job opportunities in post-pandemic times. Many feel forced into a passive role and dependent on the help of others, and consequently have little trust in governments who fail improving their situation. The pandemic has severely shaken trust in public information and media. Social disparities between people following green, social and liberal parties on the one hand and those who support extreme nationalist and populist parties on the other hand are large.

Visions for consumption in 2030

The further analysis of the scenarios, carried out together with experts and stakeholder in several workshops, focused on possible gaps between the four scenarios and the goals of the New Consumer Agenda. The outcome of the analysis are four visions for the future of consumption in Europe in 2030. They reflect different consumers' needs, including those of vulnerable groups and consumers with special needs:

- I am empowered to buy "responsibly" by accessing "responsible" data.
- I am sharing, renting & repairing.
- I can choose to live in a digital environment, where I can be in control.
- I can safely co-create and test new products, services, and business models.

The visions were the starting point for the prioritising of action fields and the development of policy ideas in stakeholder dialogues.

Suggestions for policy actions

Ten suggestions for policy actions have been developed in the foresight study. They are intended to complement the New Consumer Agenda to address the impact of COVID-19 on consumer behaviour and consumer protection, especially for vulnerable groups. They have been developed together with stakeholders from different regions of the EU and experts from different disciplines and show where there is a particular need for action from a stakeholder perspective to make consumer policy future-proof after the pandemic.

The stakeholders have prioritised seven action fields to achieving their visions in 2030. The suggested policy actions for each illustrate from the stakeholders' point of view that urgent action is needed in these areas to protect and empower consumers in light of the changes in consumption brought about by the pandemic.

Action field 1: Product labelling

- **European Agency for Sustainability**
  The agency should build centralised and horizontal capacities across the EC in order to design, implement and monitor the sustainability criteria across the DGs and to coordinate the various policy activities, ongoing and new ones. It would approve labels and pilots to test new labels and criteria using digital tools. It would serve DG JUST as an alert system for emerging consumer issues.

- **Continue to support standardisation with financing initiatives**
  It is of high importance for the success and adoption of the new labels that industry is fully involved in the development of standards. The EC should provide resources with which also consumer organisations could participate. Both the industry representatives and consumer organisations have expressed their willingness to support the label and participate in the development.

Both actions could be linked to several priority areas of the New Consumer Agenda, specifically the impact of COVID-19, the green transition, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, and governance.

The interests of vulnerable groups are addressed by providing all information needed in one label, easy and barrier-free to access online, at the point of sale and on the product packaging. This would be guaranteed by involving representatives from groups with specific needs and diversity experts in the design process.

Action field 2: Consumer product dataspaces

- **Facilitate connection for decentralised system; built on QR technology**
  The EC should promote the joint establishment of a system in which decentral available data and information on products are brought together. This is essential since the surge in online activity during the COVID-19 pandemic to make the variety of data meaningful to consumers. In addition, there is a greater need on the part of consumers for information on the relevant product properties. The suggestion is not to build the dataspace but to promote its ideas and bring the interested parties together.

The focus of the suggestion is on the European markets. Of course, many goods are produced in countries outside of the EU. Therefore, the action suggested here should be linked to the policy suggestion no. 10 (see below), where international partnerships are suggested.

The policy suggestion is relevant for the priorities of the impact of COVID-19, green transition, digital transformation, and specific needs of certain consumer groups of the New Consumer Agenda.
A well-structured and connected dataspace would support consumers with special needs to find the specific information they need in a barrier-free way. Furthermore, users can provide information for other consumers with similar needs and thus empower vulnerable groups.

Action field 3: Sustainability by design

- **Intensify consumer information with networks**
  The organisations and initiatives in the Member States with their platforms, local dialogues and workshops, can help to strengthen the active co-creation of framework conditions for sustainable consumption and consumer information on various aspects of sustainability in the long term, thereby enabling more consumers from different groups to make sustainable purchasing decisions. Therefore, it is suggested to support the most promising activities and actors of change from industry and also involve representatives of marginalised and vulnerable groups in particular, so that their needs are also taken into account.
- **Adjust legislation where necessary and possible**
  It is suggested to identify needs and review existing legislation that may be hindering. Especially for new business models and forms of consumption in the digital world, the role of legislation needs to be reviewed with a view to introducing more sustainable models. The EC can start activities by observing and analysing ongoing changes in the markets because of the pandemic and anticipating possible future gaps in the legislation. In addition, stakeholder dialogues are crucial to ensure that all interests are taken into account and that marginalised groups are included in the dialogues.

Both policy suggestions relate to several priorities of the New Consumer Agenda, specifically the impact of COVID-19, green transition, digital transformation, internal cooperation, and governance.

The suggestions are relevant for the empowerment of vulnerable groups as it is important to increase the share of sustainable products and services in the market and to make sure that all groups of consumers, in particular the ones with specific needs have access to these products and can afford it. New business models could increase access to greener products and services for all, e.g. sharing initiatives or repair and upcycling services. Furthermore, the criteria for sustainability have to cover all forms of sustainability, including social and ethical aspects. Standards are needed to guarantee that the products fulfil all criteria and that the information is available to all consumers. Finally, representatives from vulnerable groups and consumers with specific needs have to be invited to co-create the framework for sustainability by design and make sure that the activities will be inclusive.

Action field 4: Co-creation

- **Support design processes that put the consumer more in the centre (also with new technology)** The EC should provide further support for the development of processes and technologies that are more consumer-centred by institutionalising the participation of citizens and marginalised groups in the early stages of problem definition and solution development. This could be promoted, for example, through "ambassadors" and representatives in round tables or advisory boards in the development of policies, products and services. This would also facilitate mutual learning between industry and Member State policy makers and help to engage industry in initiatives such as a consumer co-design clearinghouse.
- **Identify and facilitate changes in legislation to promote purpose driven products** The EC should ensure that existing laws do not hinder developments towards purpose-built products. Instead, appropriate laws for change are needed. A study is suggested as a first step.

Both suggestions would contribute to the following priorities of the New Consumer Agenda: the impact of COVID-19, green transition, digital transformation, specific needs for certain consumer groups, and governance.

Action field 4 and the suggested actions are key for a better integration of vulnerable or marginalised groups in product design and development in order to meet the variety of needs and make products accessible and usable for all. Consumption patterns are changing during the pandemic and there are future uncertainties remaining how different consumer groups will be affected long-termed. Therefore, the learning from best practices through mapping of co-creation activities and the support of the implementation in time are needed to create opportunities for industry to better meet the changing needs.

Action field 5: Collection and use of personal data

This action field refers to the vision of increased benefit for consumers through the collection of personal data. The stakeholders discussed three ideas, but did not prioritise them. Approaches like user-centred design or privacy by design have been taken up by the New Consumer Agenda. Therefore, the ideas discussed for this action field are integrated in the suggestions of the following action field "Management of personal data".

Action field 6: Managing of personal data and preferences by consumers

- **Capacity building inside DG JUST for tackling consumer data** Further capacity building within DG JUST could be beneficial for the handling of consumer data, as a number of other issues will arise as the pandemic continues. There is a need to assess and review the existing rules and then improve them where necessary to better support data portability and integration with other applications. In addition, a longer-term study on technological possibilities of avatars etc. and their impact on innovative business models and services for consumer protection could be considered in this context.
- **Incentivise changes** The EC should create incentives for change towards 2030, when data will no longer belong only to companies. Designing the process to 2030 would involve moving from data owned by companies to data shared and used by and with consumers. Such a process would need to clarify a broad range of questions, for example who should be involved and what technical solutions and requirements are

needed. Pilots could be supported with use cases to test solutions in different environments where consumers use data for sustainability in innovative ways.

The suggestions relate to the New Consumer Agenda's priorities of the impact of COVID-19, digital transformation, redress and enforcement of consumer rights, and specific needs for certain consumer groups.

This action field is a key area of consumer protection. The rapid shift from offline activities to online shopping, work and learning because of the pandemic lockdowns has been easy or at least manageable for many citizens. However, the long-termed effects are not fully understood yet and it is already visible that specific groups were not able to manage it successfully. Therefore, further dialogues with consumer organisations and representatives of certain consumer groups have to be carried out to better understand their challenges, detect early warning signals of risks groups, and find ways to integrate them.

Action field 7: Agile and resilient consumer policy across government levels

- **Set up coordinated action with partner regions**
  The dialogues already initiated by the European Commission with consumer organisations are an appropriate approach to include different interests of consumer groups, industry associations, representatives of people with special needs and vulnerable groups. A next step would be to find new dialogue partners outside the EU to develop new forms of cooperation for standards of product safety, sustainability and mitigating supply shortages and strengthening the resilience of EU markets for future crises.

The policy suggestion can be related to the New Consumer Agenda's priorities of impact of COVID-19, digital transformation, redress and enforcement of consumer rights, international cooperation, and governance.

Interests of vulnerable groups are addressed in several ways: new risks have emerged for consumers and vulnerable groups in the EU since the pandemic. For instance, many products like hygienic articles or consumer electronics are scarce due to COVID-19 impacts on global supply chains. Furthermore, not all international online platforms are barrier-free and the demand of people with special needs is not addressed sufficiently at many online shopping platforms that are often owned by international corporations. It is important that all consumer interests are considered in transforming consumption and strengthening consumer resilience. The dialogues with consumer organisations already initiated by the EC are an appropriate approach to involve different consumer groups, industry associations, representatives of people with special needs and vulnerable groups. They should be continued and extended to additional dialogues in the Member States and with partners from outside the EU.

Conclusions

The New Consumer Agenda highlights the interactions between the twin transitions and addresses the challenges with a series of measures. The COVID-19 outbreak has massively accelerated both transitions and respective impacts. The challenge for the EC's consumer protection and empowerment in the coming years is therefore to adapt the activities already planned to a post-COVID-19 situation and the new pace of change in a globalised economy.

Consumers have been forced by the pandemic to fundamentally change their behaviour, such as working and studying from home, avoiding long-distance travel, dinners at restaurants, sporting and cultural events. It seems that some consumers want to maintain new practices permanently, e.g. working more in the home office, grocery delivery from local cooperatives or using the bicycle more often than the car or public transport for the sake of health and the environment. At the same time, many consumers yearn to catch up on many of the activities that are currently restricted, such as long-distance holiday trips or going to concerts.

While entire industries are threatened by the lockdowns, especially the creative industries, local specialised shops and tourism, the negotiation of future consumption practices will continue for some years after the end of the pandemic. It is not foreseeable which interests will prevail, which offers will disappear from the market and which new offers and markets may emerge. It should be noted that the consumers who have sufficient income and the technical equipment for more online and more sustainable consumption are a strong driving force of change. However, the remaining majority of consumers in Europe has not the power to initiate new patterns of consumption and they must not be excluded from the upcoming post-pandemic reorganisation of market and consumption structures.

All these aspects were taken into account in the study and the suggested policy actions based on stakeholder discussions and desk research relate to currently observable changes in consumer behaviour and the need for better protection and empowerment of consumers in times of the COVID-19 pandemic. A closer look at the suggested policy action fields and investigation of necessary measures to mitigate the pandemic consequences for consumers serves to strengthen the resilience of EU consumers for other crises in the future.

All suggestions for policy actions are in line with the New Consumer Agenda. The extent to which they might actually be taken up, further specified and implemented should be examined by the EC following this study. Some of the proposed policy actions represent an expansion or concretisation of already planned activities in the priority areas of the New Consumer Agenda, for example those on product labelling or management of personal data. Others represent new options for action that may not have been needed when the New Consumer Agenda was developed, i.e. before and/or at the beginning of the pandemic.

What are next steps?

The study was the first phase of future proofing the EU consumer policy in times of COVID-19 and it provides information on possible future scenarios, visions from a consumer perspective, stakeholder prioritised action areas and possible measures for prospective governance.

Stakeholders and experts were involved intensely in the development of the policy options. This implies that there is a certain degree of consensus across the different stakeholder groups about policy priorities related to the impacts of the COVID-19 pandemic on the future of consumption in the EU. The policy suggestions could serve as inputs to the debates and as a link to the policy instruments formulated in the Commission's plans set out in the New Consumer Agenda.

For some of the policy options, first actions can start in 2022, for others long-termed actions are suggested. Only with further enrichment through multi-stakeholder discussions and engagement, can the policy options become implications and lead to the formulation of policy instruments. Whether these policy instruments are legislatives, awareness raising activities, information platforms, initiation and support of stakeholder networks, capacity building activities, funding for research and innovation, or a combination of some of these, has to be further discussed and decided by the EC.

A main finding of this study is that despite the challenges posed to consumers by the pandemic, the trend towards sustainable consumption seems to be continuing, even if not all people can yet afford it financially or have access to the information and products they need to do so. Thus, despite the pandemic, the EC can continue to pursue its twin transition goal without running the risk of leaving out certain consumer groups.

1 Introduction

This document provides the results from the foresight study "Impact of the COVID-19 pandemic on European Consumer Behaviour" for the European Commission (EC), Directorate General for Justice and Consumers (DG JUST). It includes the work and contributions of stakeholders, of European Commission representatives and of the Foresight on Demand (FoD) project team.

2 Background and objectives of the foresight study

The European consumer policy is currently facing disruption and unrest related to the COVID-19 pandemic. The pandemic has had, and will continue to have, direct and indirect effects on consumer behaviour, such as the reduction of income or new consumer response strategies in the post-pandemic era. Additionally, the consequences of consumer shifts initiated by the pandemic are likely to have long-term effects on consumer behaviour, particularly if consumers might have to navigate through other types of crises in the future.

Following the approach of "Anticipatory Governance" of systematic embedding of strategic foresight methods throughout the entire governance architecture, the European Commission has contracted the FoD consortium to carry out a foresight study from January to October 2021. The foresight study covers four steps of forward-looking and participatory activities in order to prepare new post-COVID-19 measures, both legal and non-legal. With the commissioning of the study "Impact of the COVID-19 pandemic on European Consumer Behaviour", the European Commission was seeking to:

- **Develop a variety of scenarios** anticipating future post-COVID-19 challenges for consumer policy,
- **Assess likely impacts** on private consumption in the EU, as initiated by other possible future systemic disruptions and major economic shocks.
- **Develop new policy measures** that address the needs of consumers and retail markets.

The study builds the collective intelligence for short-term and long-term effects and challenges in a structured manner – despite remaining uncertainties of future paths. A special focus is on the relation of consumer behaviour, rights and markets to the Green Deal, the Digital Agenda and the New Consumer Agenda.

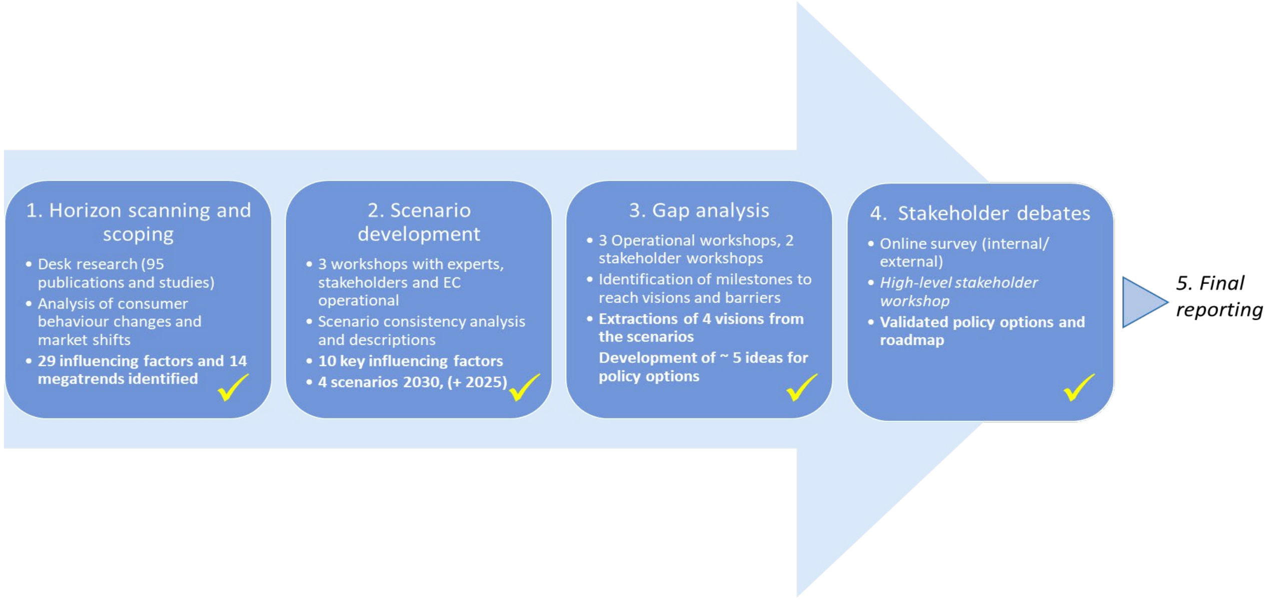
2.1 Work plan and deliverables

The work plan of the foresight study comprised five tasks in total, and Figure 1 summarises the methods and deliverables of each task. In the course of the project, stakeholders and experts were involved intensely in seven workshops, one stakeholder dialogue and an online survey (Table 1).

Table 1: Overview of workshops with experts and stakeholders

Task	Type of event	Goal	Participants
1 Horizon Scanning	3 scoping workshops (1/2 day each), Feb 2021	Introduction to foresight; setting the scope of the study; discussion of influencing factors	Experts from the foresight team, management and operational level EC
2 Scenario development	2 scenario workshops (1/2 day each), May/June 2021	Selection of key factors, development of scenarios, discussion of scenarios	External experts, stakeholder representatives from consumer organisations, policy and industry across the EU, experts from the foresight team, operational level EC
3 Gap analysis	2 workshops (visioning, roadmapping) July 2021	Analysis of vision elements derived from the scenarios, identification and discussion of risks and barriers, development of possible measures	External experts, stakeholder representatives from consumer organisations, policy and industry across the EU, experts from the foresight team, operational level EC
4 Stakeholder debates	1 online survey 1 high-level stakeholder dialogue, September/October 2021	Discussion of policy options, development of ideas for policy actions	External experts, stakeholder representatives from consumer organisations, policy and industry across the EU, experts from the foresight team, operational level EC

Figure 1: Work plan with methods and deliverables



Source: FoD Consortium

The output of the foresight process is:

- 29 driving factors and megatrends influencing the future of consumption in the EU
- 11 key factors shaping possible future scenarios
- all key factors combined into 4 scenarios for 2025/2030
- 4 visions, extracted from the scenarios
- 10 ideas for policy options, developed meet the visions.

2.2 Foresight for anticipatory governance

The study is based on a definition of foresight as a systemic approach for strategic forward-looking activities. Foresight is **"*the discipline of exploring, anticipating and shaping the future*"** (EC 2020). It helps exploring multiple futures to inform decision-making in structured way, involving experts and stakeholders in creative sense-making workshops and strategic dialogues about the future of complex issues (or complex futures). It is important to understand that foresight "is not about predicting the future but about exploring different plausible futures that could arise and the opportunities and challenges they could present" (EC 2020). In this sense, strategic foresight is different from forecasting. While forecasting attempts to predict a single "correct" version of the future based on evidence and probability (e.g. mathematical modelling), foresight uses multiple alternative plausible futures based on their usefulness in developing robust policies. In addition, the approach used by the Foresight-on-Demand consortium describes foresight as a full-cycle process, covering four phases (figure 2).

Figure 2: Full-cycle of foresight

Source: FoD Consortium

The full-cycle includes:

1. **Horizon scanning** to identify weak signals of change in society, technology, economy, ecology and politics (STEEP) the environment.
2. **Insight and sensemaking** activities to reflect on cross-impacts between the trends and drivers and develop a variety of plausible scenarios and visions of preferred futures.
3. **Strategy development** by analysing scenarios, strength and weaknesses or gaps between actions needed and current strategies.
4. **Implementation and action**, to start the actions, which could be outlined in a roadmap or strategic, plan, and monitor its achievements.

"Anticipatory Governance" is the systematic embedding and application of Strategic Foresight throughout the entire governance architecture, including policy and trend analysis, stakeholder engagement and decision-making (OECD). The EC has developed its own Strategic Foresight Agenda and publishes annual Strategic Foresight reports to build collective intelligence in a structured manner to better chart the way forward for the twin green and digital transitions and to recover from disruptions (EC 2020).

Different approaches and methods of foresight are developed and taught under the umbrella of Futures Studies in established scientific institutions and research centres in several European countries. For example, University of Turku (FI) offers international M.Sc. and Ph.D.-Programmes in futures studies. In addition, institutions such as University of Trento (IT), Freie Universität Berlin (DE), and University of Malta have prominent futures studies and research programmes. UNESCO has successfully established the Futures Literacy approach with Chairs in Foresight around the globe, promoting Futures Literacy as a capacity to analyse futures-related information and insights, and to use futures (images, scenarios and narratives of possible futures) in today's decision-making (Riel Miller, UNESCO). The OECD Government Foresight Community (GFC) is a network of foresight experts from governments of OECD member countries and engages in identifying best practices in Anticipatory Governance and Strategic Foresight for future-ready public policy. Overall, strategic foresight exercises are a form of capacity building to increase the resilience of actors, organisations and societies. In particular, strategic foresight helps to

- anticipate emerging challenges, obstacles and risks,
- manage the uncertainties and surprises that are inherent part of all futures, and to
- find adequate policy response to disruptions caused by sudden events like the COVID-19 pandemic.

Therefore, this strategic foresight project aims to support the development of policy actions and responses to the disruptive effects of the COVID-19 pandemic on European consumer policy.

3 Impacts of COVID-19 pandemic on weak signals, trends and megatrends influencing the future of consumption in the EU

The focus of the foresight study is on future developments of consumers' behaviour and consumption patterns in the EU on two levels:

- How consumers' behaviour may adjust or stabilise in the aftermath of the pandemic as regards to consumption patterns and preferences, i.e. the transition to some sort(s) of "new normal"; both in the mid-term with the time horizon 2025 (covering the timeframe of the New Consumer Agenda) and in the longer term with the horizon 2030.
- How consumers may react to other systemic disruptions in the future based on lessons learnt from the COVID-19 pandemic.

3.1 Horizon Scanning methodology

At the beginning of the foresight exercise, the project team carried out a horizon scanning in order to detect early signals of potentially important developments. The signals of change comprise emerging trends and developments in society, technology, economy, ecology, politics (STEEP), megatrends, weak signals and wild cards.

3.1.1 Scope of the study

The first step of the horizon scanning was to define the scope of the scan, which includes the criteria for the selection of the sources and the fields of origin for the trends and drivers following the STEEP-logic.
The following criteria were set for the selection of the sources:

- Origin of the source: institutional, scientific, or grey literature
- Period of publication: March 2020-March 2021
- Time horizon for scan: 2025, 2030, 2040 or later
- Territorial levels: local, national (Member States), European, global
- Type of impact related to consumer behaviour: direct or indirect, on markets or on consumers
- Consumer Agenda priorities in scope: the Green Transition, the Digital transformation, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, consumers' literacy/empowerment
- Topics in relation to DG JUST: consumer policy, consumer and marketing law, consumer enforcement and redress, product safety and rapid alert system.

A stock of 112 relevant publications was compiled, based on desk research of more than 100 scientific literature papers and foresight studies and was classified according to the criteria above in order to facilitate the selection of articles for an in-depth analysis. The list of literature has been revised and enriched during the project, taking into account additional studies and articles related to consumer empowerment and vulnerabilities, green and digital transitions as well as literature provided by the EC. Moreover, the focus has been laid in particular on a short to medium time horizon (2025-2030) and on uncertainties able to provoke a radical change in European consumers and retail markets. Special attention was devoted to identifying publications relevant for consumer empowerment, consumer vulnerabilities and digital asymmetries, and on twin transition.

3.1.2 Literature analysis

The goal of the in-depth analysis of the texts in scope was to identify issues that are likely to generate changes in consumer behaviour in the light of the twin transition and the impacts of the COVID-19 pandemic on the trends, including both the acceleration or deceleration of existing trends or the emergence of new trends. The following figure gives an overview of the variety of sources taken into account:

Figure 3: Types of sources for the literature analysis

Source: FoD consortium

Most of the studies take a holistic approach and investigate the whole consumption system and the possible paradigm shifts from the market and consumers' viewpoint. Others look at social, economic, political, and environmental and value changes specifically from the consumers' perspective while few publications focused on market structural evolutions. Classifying the publications through the New Consumers Agenda priorities required some discretion as many papers related to drivers of change able to create practices relevant for all the Consumer Agenda priorities. Thus, under the "cross-cutting" category papers focusing on all points of the New Consumer Agenda such as changes in family structures, gender gap, economic and work paradigm-shifts, consumers' preferences and shopping dynamics have been included. Other studies are related to the "digital transformation" – specifically looking at digital transition, power structure, data management, impact on retail structure, and SME. Under the category "green transition", papers related to energy transitions, mobility changes and emergence of new consumers' interest towards healthy and green products have been included. "Specific needs of certain consumer groups" contains papers looking at gender, generational and digital vulnerabilities created and/or accelerated by the pandemic. While "Redress and enforcement of consumer rights" is explored by few consumers' organisations reports, one scientific article and newspapers analysis.

The analysis also took into account the 14 megatrends identified by the JRC for the EC's Strategic Foresight Report in 2020 (Figure 4).

Figure 4: Megatrends and how they are impacted by the COVID-19 pandemic

Source: European Commission 2020

3.1.3 Key aspects of the COVID-19 pandemic impacts on consumer trends and drivers

The literature review found strong evidence that the COVID-19 pandemic, specifically its health risks and consequences as lockdowns affect the life of all European citizens in multiple ways. The pandemic led to immense changes in just 2 years and is ongoing, entailing radical shifts in consumer behaviour and consumption. European citizen´s lives are impacted by the pandemic by the

- Fear of contagion
- Work from home and difficulties of finding a work/life balance, especially for women
- Physical restrictions and social isolation during the lockdowns
- Insecurity because of little information on protection strategies in the early months
- Increased uncertainty and risk aversion due to the severe health risks
- Financial losses and risk of unemployment and other economic risks because of the lockdowns.

With the COVID-19 pandemic, radical shifts in consumption, in particular in online activities have been witnessed. Some of the developments rooted in developments which had started even before the crisis but would have taken decades of generational change if not triggered by the pandemic.

When thinking about longer-termed effects, it is important to distinguish temporary changes in practices and consumption from those that will endure. The key variable to identify relevant trends as influencing factors in relation to the COVID-19 pandemic impacts on consumption is the duration of the impact: when will it end, or will it persist over time? Following fields of consumer practices were covered:

- Life at home: time and activities
- Entertainment and social relations
- Health, food, physical activities and well-being
- Travel and urban mobility
- Communication, information and engagement, what is listened and trusted to
- Learning and training
- Work: time and place/space

When considering COVID-19 impact in different areas, we need to bear in mind that it is not the first pandemic. Past influenza pandemics have been swine flu in 2009, Hong-Kong flu in 1968-69, Chinese flu in 1957, Spanish flu in 1918 and the Russian flu in 1880. Of these, the Spanish flu hit the world hardest, affecting people and changing their hygienic and behavioural patterns. Studies show that many behavioural changes only lasted a shorter while as people wanted to get back to normal pre-pandemic time (Tomes 2010; Outka 2019). What has lasted longer have been precautions in terms of outbreaks i.e. isolation, increased hygiene measures and the wearing of masks as preventive measures. We already see now that the COVID-19 pandemic is having a "bigger" impact in terms of talking of "the new normal" instead of getting back to "normal pre-pandemic time". The above-mentioned changes provoke new consumers' behaviour that affects every single aspects of consumption: how the European citizen work, learn, shop, travel, live at home, entertain, gather information, decide and engage. However, it is uncertain which of the changes induced by the pandemic are temporary and which will remain in the next new normal.

Based on the analysis, 29 influencing factors have been identified and classified with the STEEPV-framework (Figure 5).

Figure 5: STEEPV Framework for classification of factors

	Social	Ways of life (e.g. use of leisure time, family living patterns) demographic structures, social inclusion, and cohesion issues (fragmentation of lifestyles, level of (in)equality, educational trends)
	Technological	Rates of technological progress, pace of diffusion of innovations, problems and risks associated with technology (inclusion of security and health)
	Economic	Level and distribution of economic growth, industrial structures, competition, market and financial issues
	Environmental	Pressures connected with sustainability and climate change, more localised environmental issues (including pollution, resource depletion and associated biodiversity and welfare concerns)
	Political	Dominant political viewpoints or parties, political instability, regulatory roles and actors, actions of governments, political action and lobbying by non-state actors
	Value	Attitude to working-life (e.g. entrepreneurialism, career goals, demands for mobility across places and jobs, preferences for leisure, culture and social relations

Source: FoD consortium

For each factor, main drivers, assumptions of short- and medium-termed developments, and possible varying evolutions were identified by desk research. The suggested influencing factors then were discussed, revised, and extended in an expert workshop. The participants discussed in particular the

- Emergence of new vulnerabilities and the acceleration of the previous one

- Increased digital adoption and the creation of a platform economy
- Changing relation to nature and the environment, driven for example by increased outdoor activities, climate action movements.
- Rise in power of big technological companies and their influence over consumer's demand
- New possibilities for empowering consumers, e.g. with digital platforms and RFID labels.

Furthermore, the experts categorised the possible effects of the COVID-19 pandemic on European consumer behaviour into permanent effects (stays after the pandemic) and non-permanent ("back to a certain normal") as following:

Permanent

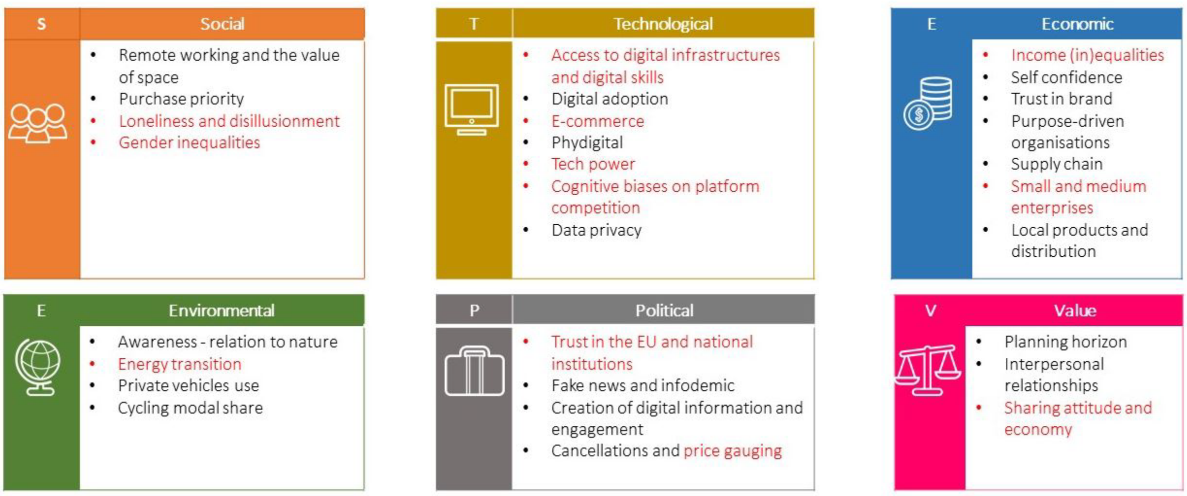
- Increased e-commerce and decrease of traditional purchase channels – entailing the risk of the end for shops and shopping street.
- Increased impact of technology on work creating the urgent need of reskilling workers
- New online consumption practices – defined by big players
- New actors in defining consumption styles: social media influencers with advertising contracts gain reach during lockdowns
- Increased attention towards healthy, sustainable products
- Risk of confusion of what is really sustainable and what is not – importance of trust, information and labels
- Increase in scams and illegal business online
- Structural changes in real estate markets, namely closed retail stores in city centres or shopping malls, less demand for office spaces because of home office etc.

Unclear evolution and impact

- Income – what will happen next?
- Attention to local products and services, or more buying online with no attention to where products come from
- Growing consciousness of consumers to environmental impact leading either to more sustainable consumption or even less consumption
- Relation to nature due COVID
- Role of apps for favouring environmental friendly behaviours versus the environmental impact of technological devices both for production (raw materials) and use (e.g. electricity consumption)

Figure 6 shows the 29 influencing factors that were discussed in the expert workshop. All factors are described in more detail in the ANNEX.

Figure 6: 29 Influencing factors



Source: FoD consortium. Colours: black = identified in desk research, red = added in the expert workshop

4 Four Scenarios for consumption in the EU in 2030 and 2025

4.1 Scenario methodology: alternative futures instead of predictions

Strategic policy decisions are based on future expectations and visions. However, what the future will actually look like depends on a combination of both expected and unexpected factors. One way of improving the knowledge-base for strategic future-oriented decisions in a solid manner is the development and assessment of scenarios. Specific foresight approaches have been developed for the creation of scenarios of the future (Wright at al. 2020; Warnke & Schirrmeister 2018). Quite the opposite of predictions that claim how the future *will* be, scenarios shed light on *different, plausible, future outcomes,* and promote a broader understanding of the different futures that are possible. This in turn, enables policy decisions to encompass an expanded scope of *what might be*, and make informed decisions with respect to *attaining a more desirable future.*

It is important to note that scenarios are not forecasts. Forecasts are heavily reliant on historical data, and thus are often blinded to events and possibilities for which no historical data exists, or projections that are seen too far outside of the realm of possibility. Scenarios, on the other hand, strive to account for possibilities that might not be possible to model, but can be approached through rigorous imagination. When uncertainty of possible paths increases the further one looks into the future, this is in part due to the increased interactions between any given factor and the others. These interactions are opportunities for the emergence of novelty, and scenario development processes in foresight are specifically designed to help decision-makers in approaching this space of possibility in a productive and useful manner. In this way, strategic foresight facilitates the identification of future challenges and opportunities across various scenarios and thus help make policy decisions future-proof.

In order to gather as much expertise as possible for the scenario development and assessment, experts from various domains and representatives from relevant stakeholder groups should be involved in different stages of the process. The participatory approach is essential for policy-oriented foresight processes to best account for, utilise, or reduce biases and perception filters in future-oriented decision-making. A diverse participant group in the scenario development process broadens the assumptions for the scenario narratives and helps ensure that the resulting scenarios will better account for uncertainty.

How have we proceeded to project the development of consumption in Europe into the year 2030?

The future scenarios created in this study are based on the horizon scanning activities and trend analysis in which experts *identified* 29 factors with a high influence on the future of consumption.

With the goal to select a smaller number of *key factors,* the influencing factors from the scanning where discussed in an online workshop, together with experts and stakeholders*.* The participants selected 11 key factors and developed 3-5 alternative, plausible future paths through the year 2030 for each of them.

In a second workshop, the stakeholders and experts created consistent and coherent scenarios for consumption in the EU in 2030. Therefore, they combined the factor assumptions into narrative threads.

The scenario method applied here enables a structured examination of conceivable alternative development paths. In this way, the scenarios raise awareness of the fact that complex topics do not allow a simple distinction between a best-case and a worst-case. Scenarios make the future tangible today and enable their users to detect a) systematically the positive visions from the different scenarios, b) identify barriers to overcome, and c) elaborate policy options to support consumer rights in the next decade – despite remaining uncertainties of the future developments.

4.2 Factors selected as key for the scenario development

The stakeholders and experts selected 11 *key factors* out of the 29 influencing factors in the first scenario workshop. The key factors are drivers with in-built uncertainty. This means that the development paths could go to different directions (unlike e.g. digitalisation that will, most likely, only increase during the decade of examination) Furthermore, the key factors selected, all have a high impact on different shapes of the future of consumption, and in addition *would be impacted by* the COVID-19 pandemic. Figure 7 provides an overview of the key factors. Below they are described briefly.

Figure 7: Key factors for the scenario development

Source: FoD consortium

1. **Income (in)equalities**
   This factor describes disparities in income levels across the EU as well as in the EU Member States, driven by the economic impacts of the COVID-19 pandemic as well as by other reasons (as e.g. long-term consequences of the 2007 global financial crisis). It differs in the scenarios in different ways, like in the relative rise of top incomes and the relative decline of incomes among households at the bottom end of the scale. Income (in) equalities are interlinked to the amount of social polarisation between rich and poor, but also between cultural and ethnic groups.

2. **Energy transition**
   Improvement in energy efficiency and production, distribution and use of renewable energies are the goals of the energy transition, which has become the major societal challenge and a policy mission in many countries even before the COVID-19 pandemic. This factor reports these improvements and/or declines amongst the Member States concerning the "green transition".

3. **Remote activities & digital transition**
   The shift towards remote activities (working, studying, shopping, etc.) and digitalisation during the COVID-19 pandemic changed the life of all European citizens. The speed at which the digital transition continues even after the pandemic and the associated need and use of physical space differs in the various scenarios.

4. **Role of young people in EU**
   The power and influence of young people in society also compared to other age groups remains subject of constant struggle in the European aging societies. During the COVID-19 pandemic, children, adolescents and young adults were particularly affected by the restrictions and lockdowns. This factor describes the role that young people in the EU play with regard to the sustainability transformation and ethical values in the Member States.

5. **Awareness – relation to nature**
   Citizens' awareness of nature and interest in natural and healthier products changed in the pandemic towards increased awareness of impact of consumption on climate change. These changes have an impact on consumer behaviour, such as purchasing decisions regarding sustainable products and services or the choice of leisure activities.

6. **Fake news and infodemics**
   An over-abundance of information – some accurate and some not – can make it hard to find trustworthy sources and reliable guidance when needed, which challenges the public discourse especially during the COVID-19 pandemic. This factor describes how the various Member States and at EU level deal politically with misinformation and fake news.

7. **Urbanisation and suburbs in rural areas**
   Social (in)equality, housing prices, remote work opportunities, and the trend towards outdoor activities and sustainable lifestyles influence the degree of urbanisation, suburbs in rural areas and de-urbanisation. Metropolitan areas and city centres as well as rural areas develop differently depending on the financial resources and interests of the residents. This affects the consumer behaviour and demand for delivery and mobility in different ways in cities and rural areas.

8. **Economic system and growth**
   This factor describes various possible characteristics of (social) market economies and economic growth. It encompasses the aspects of sharing economy, post growth society and dealing with investments and profits, which are highly interlinked with different types of consumption.

9. **Data privacy**
   With the digital transition in particular, more and more attention is being paid to data privacy. Consumers' willingness to share data differs, often they are not aware that data is shared while purchasing. Other consumers are well aware of sharing personal data during their online shopping, but accept it or welcome benefits of convenience. This factor deals with the political handling of platforms with insufficient or non-transparent data policies and the implementation of the GDPR.

10. **Social identity and status symbols**
    The pandemic lockdown has affected the expression of social identity through status symbols and levels of consumption, as people had to reduce or temporarily stop consumption and had fewer opportunities to share their symbols of identity in public. In the scenarios, the various political dimensions of consumption, as well as the connections to social identity and status symbols are taken up.

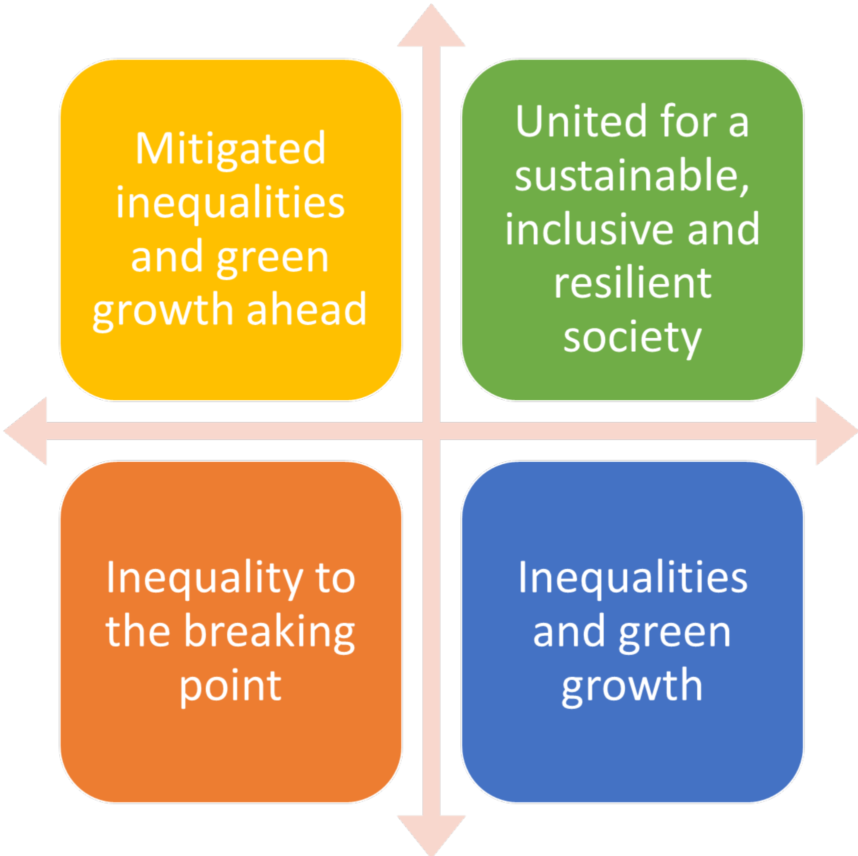
11. **Personalisation and profiling**
    Online platforms deploy sophisticated AI software for the analysis of user data. They use this for advertising and influence consumer purchasing via data and architecture interfaces. Personalisation goes beyond just targeted advertising. Targeted advertisements influences what the individual wants to buy, but personalisation may also define if the individual is allowed to buy what he or she wants (get a loan, insurance etc.). This can have a strong influence on consumer behaviour and become a social challenge.

4.3 Key aspects of the scenario descriptions

The four scenarios presented here outline four different development paths for consumer behaviour in the European Union. None of them is a simple continuation of current developments. There are relevant changes compared to today, each of which is the result of the interaction of individual key influencing factors. The scenario descriptions summarise the main characteristics of each scenario – as discussed and created by experts and stakeholders in two scenario workshops. The four scenarios are titled (Figure 8):

- United for a more sustainable, inclusive and resilient society
- Inequalities and green growth
- Mitigated inequalities and green technology
- Inequality to the breaking point

Figure 8: Four scenarios of the future of post-pandemic consumption in Europe



Source: FoD consortium

In light of the priorities of the New Consumer Agenda and the critical importance of a high level of consumer protection during and after the COVID-19 pandemic, two aspects have been considered as crucial for the shapes of the scenarios. First, different forms of **inequalities in society** in each scenario and how they are related to the COVID-19 pandemic effects are highlighted in each scenario. Secondly, the roles of **two emerging types of consumers,** characterised by contrasting attitudes towards sustainable consumption, are illustrated in each scenario. The two types differ in their understanding of their own role and their ability to contribute to the climate goals. They are characterised as follows (SIFO 2021):

- **Responsible consumers** – They believe that they, as individual consumers, can contribute to solving the climate and environmental problems by changing consumer behaviour in particular by reducing consumption and buying new products only when needed. This group consists in large parts of the population aged 35 and younger. Elder generations are also represented here, but in less extend. This group's lifestyle reflects their understanding of the interrelation between natural resources, biodiversity and personal well-being. For them, sustainable consumption is crucial. This group sets the trend in sustainable, responsible and ethical consumption

- **Technological optimist (Tech-optimists)** – They believe that new technologies will solve climate and environmental problems without leading to major changes in their way of life. This group is spanning over all ages and its members are not as willing to change consumption behaviour. Tech-optimists count on politics, research and innovation, so that climate and CO_2 reduction goals can be reached without a reduction of consumption.

Today, the **responsible consumers group**, while relatively small, is politically active and gaining visibility. The group is represented to a large extend by 35-year-olds and younger, although some members of the "Generation X" also follow this trend. Some of them are activists in the movements that accelerated by the actions of Greta Thunberg and other emerging initiatives around it[1] and believe that the individual consumer can contribute to solving the climate and environmental problems (SIFO 2021). They are willing to buy less and more expensive goods if necessary, but also more second-hand/upcycled and to share or rent some products like bicycles. They also make an effort to ensure their purchases are ethical. For example, they are willing to pay higher prices for regional and organic food and to abstain from an overconsumption of animal products, flights or car mobility for the sake of mitigating the climate change. They are eager to know where their products come from and how they are produced, and refuse to buy products without a fair or ethical production label. By this, the responsible consumers increase the pressure on companies and traditional brands to demonstrate corporate social, environmental and ethical responsibility. Activist influencers on social media and video channels who promote sustainable consumption have a strong impact on beliefs and consumer decisions of the younger members of this consumer group (Social Media Atlas 2021). In addition, the concern for the environment among European consumers has also increased during the pandemic (Eurobarometer 2020; McKinsey 2021). Consequently, politics and legislation are increasingly under pressure to support their demand for more sustainable and responsible consumption. This group of consumers lives more often in urban areas than in rural areas.

The second group, called the **technological optimists,** is represented in greater numbers and not age-specific. They are characterised by believing that "new technology will solve climate and environmental problems without leading to major changes in their way of life" (SIFO 2021). This consumer group is not willing to change their behaviour and does not believe that own actions make a difference. Instead, this group expects innovative green technologies and products to help mitigate climate change. According to the SIFO (2021), the number of technology optimists has been increasing in the period 1993 to 2020, which may be related to many discussions in the ongoing environmental and climate debate. A measure that is often highlighted by the technological optimists in climate policy is CO_2 capture and storage. Here, the hope is that it will be possible to reduce emissions from oil installations, gas and coal power plants and the like. In the view of the technological optimists such measures are far more effective than trying to influence people's consumption patterns. Nonetheless, some consumption patterns can be observed more often among the technological optimists. For example, they tend to prefer biotechnical products like flavoured engineered energy drinks, instead of local organic food.

Of course, not all consumers fall in these categories, but they represent emerging attitudes and behaviours related directly to both the digital transformation and the green transition, which could also be affected by the COVID-19 pandemic. Today, according to the SIFO study, the balance between these groups varies across the Member States, dependent on the level of income, unemployment, ageing demographics, access to internet or level of altruism. Consequently, in this report of the four scenarios, the balance between these two groups as well as their possible influence on society has been worked out separately for each scenario.

[1] For example, “Fridays for Future” (FFF) movements across the Member States including Scientists for Future, Parents for Future, Climate Strikes, etc.

4.4 Scenario: "United for a more sustainable, inclusive and resilient society"

Summary

In 2030, the securing of a fair income to support people in critical situations and fighting poverty is of top priority across the EU Member States. In order to speed up the sustainable energy transition, taxes, incentives and grants are widely accepted. Diverse policies to protect private data are in place. The positive development of the markets after the pandemic is accompanied by a recovery of the labour market. Remote work is common in well-paid, knowledge-intensive jobs. After the experiences of social isolation and distancing during the lockdowns, today in 2030, social cohesion is high; being not only digitally but also socially connected is very important. Young people are drivers for the shift of values towards inclusion and empowerment. For many consumers, status symbols are sustainable products and practices.

4.4.1 Scenario description

Securing fair income for all and fighting poverty is of top priority

In 2030, the securing of a fair income for all citizens in the EU is of top priority. Fighting poverty is still one of the main tasks on the European Union's agenda. During the pandemic, many citizens experienced how vulnerable they are to sudden income losses or even poverty. The European vision is to enable every European citizen to recover quickly from any kind of life accident, reskill whenever needed or to rebound to a different job. After a decade of experimenting to mitigate post-COVID-19 effects on income, many countries in Europe have successfully implemented some form of basic income scheme for people without income and changed their taxation models to finance it. This model is quite different from the early basic income experiments in 2020, especially from the initial universal basic income approach. The Member States have cooperated closely to incorporate their learnings and experts' insights into the final model. In 2030, wide disparities in income levels across the EU are reduced by tackling inequalities in access to digital services, education/reskilling, and health care at Member State level. The citizens in the EU are aware of the effects of the European efforts for more stable living standards. This contributes to a high personal identification with the EU and is reflected in a high level of trust in government and consumer markets in general, visible in real-time in the EC Consumer Scoreboards.

Sustainable energy transition supported by incentives

Policymakers, companies, and citizens have taken the green transition very seriously and have implemented many actions for integrating renewable energies, which are widely accepted. Most of the policy actions are rooted in the policy missions from the period shortly before the pandemic to increase energy efficiency and have been implemented and improved constantly with the Green Deal and joint programmes after the pandemic. Circular economy models for production and consumption are widely implemented in many sectors, pointing into the direction of almost 100% of renewable energies and high rates of re-use and recycling in the several key sectors in Europe. The investment programmes in research and development have achieved significant results. For example, products like sustainable transparent plastic films are made of recycled biomass. European food producers have developed energy efficient production methods for providing alternatives to meat, so a larger number of people can adopt a more flexitarian lifestyle.

In all European countries, policymakers tried and tested incentives for companies to produce in a more sustainable way, more locally, more rapidly, at a cheaper price and for consumers to trust in sustainable initiatives. Best practices were shared actively and rapidly at European level.

Since the mid-2020s, to further support a sustainable energy transition, most EU Member States have given grants to their carbon intensive industries. The goal is not only to reduce emissions drastically without influencing production costs too much, but also to support a successful energy transition of the regions by letting the companies engage with citizens in participatory processes and co-creation of the future of the region. This has led to diverse, tailored initiatives, such as local sharing and repairing cooperatives. Incentives to promote green energy businesses and fair and sustainable consumption had been another driver – in Member States and on the EU-level. For example, some include an allocation quota of energy use per person and for use above this quota the price becomes marginally higher as the person has to pay additional taxes (same for water). The consumer incentives were followed by carbon taxation, which was adopted for industries at a later stage so that it gave them time to adjust. The taxation models largely finance the measures to tackle the remaining social and income inequalities.

More inclusive society

Many citizens in 2030 fear that they could be vulnerable in the next major crisis. They experienced that their situation may change quickly with a crisis, e.g. a pandemic, a natural disaster, a financial crisis, a personal problem or a societal turmoil. In many countries in the EU, those who had been affected strongly by crises recently, learned that political solutions could be found to support vulnerable groups. This all contributed to the current high demand in public debates for a more inclusive society. Several issues are discussed in this context on social media and in many online citizen dialogues. How resilient is the new health system, which was developed in response to the COVID-19 pandemic? How can the still existing digital divide be mitigated? Innovative prototypes of services, such as the provision of universal access to digital services as well as local in-person services, in particular to the most vulnerable populations, are tested currently in cross-country studies. Today's public awareness (in 2030) is focused on issues such as life-long reskilling. The latest EU Agenda for Education defines collaboration, communication and co-creation skills as key to empower people and to support collaboration and experimentation within the society. These skills are needed in local innovation labs and maker spaces. Other issues in public dialogues are how to make people more resilient to life accidents, or how to address climate change more effectively at all levels and in all policies.

Climate change – a change of mind-sets

During the experience of the COVID-19 pandemic, which was viewed as a real "wake-up call" on how strong the impact of humans on climate change actually was, people realised that the combination of industry investment and changes in individual behaviour made all the difference for the environment. For instance, they experienced what life could look like without air travel. They also realised that neither growth nor de-growth was the answer but a new economic paradigm had to be created. This new paradigm gained more and more popularity and acceptance: "growth with social responsibility". One important effect of this shift was the increased attention paid to the global impacts of consumption, e.g. natural resources and nature were given financial/economic value as well as legal entity rights. The definition of developed/developing countries was turned around with impact on the world order and international relationships. In 2030, former developing countries are appreciated for the low impacts of consumption, while former developed countries have to catch-up.

Experimentation in living-labs as well as co-creation have changed innovation

Across the EU, citizens have now changed their behaviour towards a more sustainable way of life, trying to reduce their ecological footprint. Co-created local solutions like food or banking cooperatives help sustainable living to develop, especially if changes are needed for financial reasons. People with lower income or other individuals from marginalised groups contribute and benefit from appreciative co-creation processes in several ways. For instance, they can bring up creative ideas for frugal solutions, share their experiences and can join efforts with others.

Remote work for well-paid, knowledge intensive jobs

Remote work is quite common in well-paid knowledge-intensive jobs. Many remote workers are high-skilled and self-employed. A work-life-balance is of high priority to them, no matter if they live in urban or rural areas. This is possible because of the "universal access to digital services" (faster digitalisation with high-speed internet, remote/home offices legislation) as well as programmes to ensure access both to digital and in-person services (in particular for vulnerable people), which were adopted in many countries for the economic recovery. Digitally skilled remote workers moving out of the city centres are important for the ongoing revitalisation of rural areas but need personal services (kindergarten, schools, etc.). Doctor's visits, physiotherapy and psychotherapy, as well as legal consultations or court hearings are held online in many places. For people with lower incomes and those who have to do physically demanding work (e.g. in construction, in supermarkets, in agriculture, in medicine, etc.), remote work is often limited. Reasons for limitations often include insufficient internet access, low digital skills or that workers are physically bound to their place of work. There are efforts to equip all citizens with digital devices and decouple access to digital activities from financial resources. This is especially important for remote schooling.

The movement of highly skilled people into rural areas leads to increased spending, more appreciation for the environment in these areas, and more business by locals for locals. In 2030, this has led to high prices for housing in the suburban and rural areas but also to more income possibilities. Tensions between newly moved-in and established rural residents occur and must be resolved with adapted rules of conduct.

Young people as drivers for shift of values towards inclusion and empowerment

The children of the 2019 pandemic are the young adults of today and they have learned from this highly formative experience. Younger people in 2030 have a more relaxed perspective on privacy and living with Artificial Intelligence or robots compared to older generations. However, in an aging and shrinking society, it is difficult for them to enforce their claims. For them, new technical possibilities should be better exploited, besides privacy debates. Yet, young people are making their voices heard. They have been the first movers standing up because of social disparities and empowerment of vulnerable groups. They have initiated a shift in societal values towards collaboration, inclusion and participation. In some countries in other regions of the world young people are not the minority. Through networking around the world, young people in Europe have initiated a global movement and have found ways to negotiate solutions with the rest of the population. The influence of the younger generation is high – and the social movement is still ongoing.

Policies to protect private data

Since the pandemic of the 2020 people buy most products online, also previously in-person services such as (mental) healthcare, exercise training, language lessons, concerts and cultural activities. In 2030, virtual is the default mode for most professional meetings and interactions between professionals and their clients, for instance for insurance brokers or real estate agents. Since the mid-2020s, social media platforms offer virtual and augmented spaces for people to meet and stay in touch with one another. This is highly accepted and intensely used since people became used to virtual socialising during the COVD-19 pandemic lockdowns. The protection of personal data online is therefore a pressing issue in 2030.

Technical standards enable consumers to customise their data profile so that they can participate in and benefit from mass testing and mass customisation as they wish. People can set their profile to "free" or "paying" and be connected to organisations that negotiate the data service on their behalf. For example, a consumer can accept to provide some health data for cancer research managed by a cancer association and decide whether to sell online shopping data or internet usage data to private companies. Personalisation of products and services by platforms and companies is common, but consumers feel empowered to act on it and benefit from regulation to fight any misuse.

New models of innovation infrastructures emerged some years ago, for example data cooperatives. They are trustful organisations all around Europe and offer a secure way of using private and business data for research and innovation, marketing, retail, and services, e.g. for health products or urban mobility. Consumers participating in the cooperatives experience the benefits of data sharing but also learn about the risks of experimentation.

The EU has adopted a regulation against possible exploitation of vulnerabilities, e.g. to make digital products addictive or increase the time users spend on platforms. The enforcement of the regulation is a challenge in a global digital economy.

In an increasingly bi-polar world (USA and China), today, in 2030, there is awareness among policymakers and stakeholder organisations of the need to respond and to protect the rights of European consumers not only within the EU but also outside of it against exploitation.

4.4.2 Proportion and influence of the two consumer profiles in this scenario

The responsible consumers group that started around young climate activists and the Fridays-movements became a trendsetter for the whole population for a more active consumers' role in the green and sustainability transition. As many of the activists from 2020/2021 have influential positions in research, industry and politics in 2030, they are supporting a Europe-wide movement, joining forces of different activist organisations advocating sustainable behaviour. The trendsetters from 2020 are mainstream in 2030.

Today, in 2030, sustainable consumption is mainstream, motivated by either responsible consumption or technological optimism. From the beginning, the responsible consumers have competed with the technological optimists whose understanding of fighting climate change is far from abstaining from consumption. Instead, the tech optimists aim at increasing consumption of high-tech products, which stem from sustainable production processes and bioeconomic innovations. Tensions exist between the two groups, but they are often addressed through debate, negotiation and collaboration around key societal objectives. The balance between both groups is achieved differently per Member State. In Member States with a weaker economy, in 2030 there is an ongoing public debate about sharing economy and its potential to reduce social tensions.

4.4.3 Impact on consumption

Across the EU, consumers have changed their behaviour towards a more sustainable way of life, trying to reduce their consumption, and take care of common goods. For example, in living-labs and experimentation labs, they are becoming prosumers (e.g. in smart city services) and entrepreneurs (e.g. electric car owners provide energy for grids or rides for smart logistics). There are social enterprises that facilitate collaboration activities among citizens, entrepreneurs and firms. Industrial companies have set up co-creation platforms and standards for collaboration and innovation activities with the prosumers, in particular from marginalised groups. For instance, producers for household devices run open labs, in which consumers, local food providers and researchers develop aquaponics stations for their neighbourhoods. These activities create new consumer markets and enable producers to achieve economies of scale, which makes the products more affordable to a wider population.

In 2030, sustainable lifestyles are seen as fashionable and desirable across the EU. Some people feel that they will upgrade socially when switching to less energy use. Some companies have adopted this in their business models and offer incentives or services to citizens who buy more sustainably and therefore less frequently. Many people are experimenting with changes in their lifestyle because they understand that nature, resources and their personal lifestyles are deeply interrelated. The increased feeling of a connection with nature induces citizen engagement in protecting natural areas and in adopting sustainability criteria in their practices. For example, used, long-lasting products are valued as "classic" and "vintage" and are a status symbol. As a result, industry is reacting and the recycling business is flourishing, as are public-private-sharing platforms. Many items, for instance e-bikes or furniture, are being manufactured in a modular manner, so that individual parts can be easily replaced when needed.

As most consumers buy their products online – including food – packaging of delivered goods is a problem. At the same time, many people refuse to buy products without a sustainability label. The European market share of products that are state-labelled as socially and/or ecologically sustainable is larger than that of products without a sustainability label, and sustainably produced products are usually no more expensive than conventional products. However, there is a plethora of eco and fair labels, which sometimes confuses consumers. The EC is strongly engaged in fighting fake information and news, combining measures such as the European Rapid Alert System, support for fact-checkers and researchers, strict adoption of EU Code of Practice and more. Retail platforms, like Amazon and Zalando, are liable for the products sold through them. These measures contribute to the reliability and trust in the market. Nevertheless, even with these regulations, it is hard for citizens to get orientation about what is fake and what is right on social media.

Incentives are in development to encourage European consumers to choose rather sufficiency-oriented and more responsible products and services. Through the efforts of the Member States to equip all citizens with digital devices and to train in digital activities, inequalities to decouple access to digital activities and services from financial resources succeeded. Even vulnerable groups have access to digital activities and services. As a result, older generations, for example, are also using e-commerce and are more participating in online cultural events. Young people are skilled to work in digital jobs, to shop online and to have their social relationships online. Many products and online services are barrier-free by design and if not, disabled people use special assistance software. People without permanent residence have a digital address and thus are not excluded from services. However, some digital products remain to be highly addictive and pose a particular risk to vulnerable groups such as children and adolescences, or people with mental health problems.

4.4.4 Impact of the COVID-19 pandemic in this scenario

In this scenario, the COVID-19 pandemic has strengthened social solidarity across Europe in the long term by making many people aware of their own vulnerability and of the fact that crises can only be resolved in cooperation within society and between societies. In 2030, these ideas have led to the reduction of wide disparities in income levels across the EU, as the support for initiatives tackling inequalities in access to digital services, education/reskilling, and health care at Member State level reached soaring levels.

As many activities have remained online even after the COVID-19 pandemic, the up-take of online activities in the early 2020s was a real "wake-up call" for digital consumer rights protection and sustainable consumption in the digital society. The combination of industrial investments into the digital transformation, changes in consumer behaviour and how vulnerable groups were affected by the crisis made all the difference. A new economic paradigm had to be created: "growth with social responsibility".

4.4.5 This scenario in 2025

In 2025, people in the EU are still struggling with the aftermath of the COVID-19 pandemic, the flooding, extreme drought and forest-fires in some regions and heavy rain in others. This led to limited public budgets and many people who lost their jobs and housing still rely dependent on state aid. Economic turmoil is decreasing; but there are still many unemployed people, prices are rising and inflation continues to affect purchasing power year after year. However, the EU Member States and their citizens have learned from the COVID-19 pandemic. The young generation, also affected heavily by unemployment, has started a movement for a change in values and the mitigation of climate change and – building on the experiences of the climate activists movements – is influencing all generations. The young climate activists from the early 2020s became the drivers of value change for the whole population and laboured for a more active role of mainstream consumers.

Many citizens experienced during the pandemic and the climate related disasters such as flooding or forest-fires that started at the beginning of the decade that they can be secure today and vulnerable tomorrow. There is a permanent threat of new crises. In many countries in the EU, the citizens experienced that aid funds and policy measures can help. Therefore, more people would accept measures like tax increase to support vulnerable groups.

A small number of Member States have started experiments to mitigate post-COVID-19 effects on income, in particular with new forms of basic income for those who have no income or other vulnerable groups. This is supported by movements for fair income and minimum wages in most of the EU countries, also driven by a shift in societal values towards collaboration, inclusion and participation.

After the increase of natural disasters that were traced back to climate change, more policy-makers, companies, and citizens have started to take the Green Transition very seriously and demand for actions for integrating renewable energies and changing consumption. During the COVID-19 "wake-up call", people realised that the combination of changes in corporate business investment strategies and changes in individual behaviour made all the difference for the environment. More and more people realise that neither growth nor de-growth is the answer but a new economic paradigm is needed, which gains more and more popularity and acceptance: "growth with social responsibility".

Policy to fight poverty increase inclusion of all and foster the transitions into a green, sustainable era by continuing the Green Deal and digital transition – now clearly in a twin transition. New carbon and other climate goal related taxes are discussed for financing the new programmes, as well as grants for companies to allow a smooth transformation, especially in the shift towards renewable energies. There are many incentives for industry and consumers at place to support this transformation – also locally and regionally.

The well-paid knowledge-workers have continued remote work after the pandemic, although many companies do not accept full-time home-office. Some rural areas already profit from those people moving to the suburbs and the countryside for different reasons. A revival of the rural areas seems to start.
In many EU countries, measures for a "universal access to digital services" (faster digitalisation with high-speed internet, remote/home offices legislation) as well as programmes to ensure access both to digital and in-person services (in particular for vulnerable people) are adopted. It will take time to implement them.
The EC is fighting fake information and fake news and is establishing a European rapid alert system for fake news in cooperation with Member States' media broadcasting companies.

4.5 Scenario "Inequalities and green growth"

Summary

In 2030, the economic inequalities are exacerbated and unemployment rates among the EU Member States are constantly high. In consequence, poverty has increased. Affordable housing is a major issue, not only in cities and metropolitan areas. Due to the bad economic situation, political tensions between European Member States are growing. For citizens, the personalised consumer experience and prices are widespread. Sustainable consumption is not of highest priority for all. A trend for responsible living and consumption is emerging, mainly driven by young people. Yet, the "technological optimists", representing the majority of consumers, are not willing to change their consumption level drastically, and tensions are growing between these two groups.

4.5.1 Scenario description

Exacerbated economic inequalities and high level of unemployment

Even before the COVID-19 crisis, widening disparities in income levels were evident across the EU Member States. The long-term effects of the COVID-19 crisis have exacerbated these social and economic inequalities across the EU. Those Member States that had strong economies before the pandemic, and were able to get COVID-19 infections under control, have returned to employment rates comparable to pre-pandemic times. In contrast to this, the social and economic conditions in economically weaker EU Member States deteriorated even more in the years after the pandemic. There are various reasons for these macro-level socio-economic disparities, in particular, the macroeconomic effects of the corona crisis since 2020, pronounced regulation of digital markets, and lower technology adoption rates in poorer EU nations. In addition, ethical concerns about Artificial Intelligence (AI), and a shortage of skilled workers are hindering growth. All of this results in a decrease of the EU's technological sovereignty in important areas such as digital platforms and networks. Digital corporations from outside of Europe are dominating markets for digital infrastructure development, advertisement, media production, and digital marketplaces. AI systems have replaced many jobs, even some creative and consulting tasks in the service sector. There is high risk of a brain drain and shortage of skilled workers in most sectors in Europe.

Poverty have increased

In addition to the inequalities among the EU Member States, there is also an increase in social disparities within many individual Member States, which is even more acute in countries and regions with high unemployment. In none of the Member States the COVID-19 pandemic was fully under control and managed quickly, but some Member States that had a sound national budget policy before the pandemic, low unemployment rates, and were able to invest more in social welfare during the crisis, recuperated more quickly from the pandemic's economic effects. By contrast, those states that had government budget deficits and problems with high unemployment before the crisis, rapidly reached their limits of financing social welfare during the pandemic. These countries have struggled to provide minimum social security benefits both during and after the pandemic, exacerbating pressure on health systems struggling to care for aging societies. Consequently, a number of Member States in Southern and Eastern Europe are facing high unemployment, disproportionately affecting women, and under-skilled workers across all age groups. Despite post-COVID-19 policy measures at national and at EU level, in many countries, the number of people in, or at high risk of, poverty is at its highest level for decades.

Political tensions between European Member States

Political tensions between the EU Member States have increased since the pandemic due to high unemployment rates and different economic and fiscal strategies. Economically weaker states seek financial support from stronger ones, but financial compensation agreements fail to materialise. Since the early 2020s, three countries have left the European Monetary Union and reintroduced their national currencies to counteract their economic decline. Other Member States have been threatening to leave the Union for years, in particular those whose nationalist or populist governments have risen to power since the pandemic. Consequently, there is a fear that the European Union may implode politically.

Generally, trust in national institutions and the EU declined since the pandemic. Whereas in 2021 almost half of Europeans stated they trust the European Union, in 2030 only one-third still do so. Political think tanks from

Asia claim that the quality of Europe's democracy has been declining due to weaker checks on government, limited civic space, and the rise of populist and extremist parties. Additionally, in many Member States, distrust in national governments and political elites is very high. This holds not only for those countries with higher level of scepticism in politics, but also for countries that had been an example of high government trust before the COVID-19 crisis. Critical voices claim that since the pandemic, many governments have overstepped the constitutional limits of their powers, undermining freedoms of movement, assembly, and speech.

Live events and outdoor festivals are a trend

In 2030, live events and outdoor festivals at places with a lot of space are hip and always crowded, in both cities and rural areas. Travelling to outdoor festivals and camping is popular for all ages, given less disposable income for cultural events and travelling since the pandemic. However, for those that can afford it, luxurious, private festivals in chalet villages are fashionable. Leisure flights are very expensive due to the decline in business travel since COVID-19. In addition, CO_2-taxing is in place and affects mobility choices. Few Europeans can afford flights to travel to places around Europe, the majority travels by train, bus or private car. Not only is the income gap wide, but different lifestyles related to income lead to more social disparities. There are those who travel to mass live events, and those who enjoy holidays in private villages, those who eat out at fancy restaurants with experimental cooking, and those who eat convenience food for take-away, those who attend concerts and theatre productions, and those who use digital entertainment platforms online. The younger generation acts as a trendsetter for sustainable behaviour and some young people are also engaged in social movements towards more social equality within Europe.

Personal relation to nature varies according to citizen's values and financial resources. While for some citizens a strong connection to nature is important and they are committed to nature conservation, this has no relevance for other population groups.

It is difficult for many people to afford housing

The income polarisation results in increasing impoverishment in some urban and rural areas. Green areas are synonymous with affluence, quality of life, and better resilience to climate change. A significant share of the middle-class population is living in green suburban and rural areas. As digital infrastructures have improved, teleworking in 2030 is practiced by many (self-) employed knowledge-workers. This digital transition process is still going on in high-income regions.

Despite the trend towards living in rural urban areas, real estate prices are still high in many city centres. Real estate in city centres are speculative objects in the EU. Affordable housing, especially for young people and essential workers, is a big problem. In many European countries, increasingly in the northern ones, younger people continue to live with their parents because they cannot pay rent for their own accommodation. Sharing flats have become a necessity not only for students, but also for many citizens, in particular singles and single parents.

Renewable energy production promoted by policies

In the European economy, the development towards green growth progresses, but slower than expected due to the compounding effects of the pandemic. The shift towards renewable energy generation, and improvements in energy efficiency and production, are the major policy missions. To promote climate-focused actions, greenhouse gas-related taxes and incentives were implemented early after the pandemic across the EU. Both industries and citizens are widely accepting this action and it significantly contributes to "greening" the economy, despite the economic disparities that persist. It has fostered the production and use of renewable energies in all sectors. Across the EU, around 70% of gross final energy consumption is based on renewable energies. In addition, several energy cooperatives founded by engaged citizens aim to be self-sufficient in their energy production with decentralised solutions for energy generation.

Product and service personalisation facilitated by data sharing results in personalised pricing

The digital economy, with Artificial Intelligence for data analysis in particular, has pushed mass personalisation further for both digital products and services (e.g. content streaming, online platforms). Therefore, access to consumer data is key for tech companies. For a consumer, allowing access to personal data is essential to get customised products and services. Privacy and data-security concerns as barriers to digital consumption are notions from the past, although platforms are under constant attack from cybercriminals. Many consumers do not have the option to opt-out of data sharing as it may be tied to specific work tasks, or essential for their social and economic activities. In addition, most consumers do not mind leaving data traces in digital marketplaces or other casual networks. The general public understanding is that most consumers trust AI technologies and data cryptography used by the companies, and further that consumer data analysis helps them get what they need, and can afford, more accurately and efficiently. Finally, since the COVID-19 pandemic, there is an openness to data sharing for health, safety, and other communal reasons that easily translated to data sharing across many other contexts.

The collection of consumer data within digital ecosystems has amplified the economic power of the private sector. In 2030, a public debate in the EU has resurfaced concerns about the practice of using AI to exploit psychological weaknesses. Examples are the creation of interfaces to make digital products intentionally addictive, or the use of deep fakes to prey on socially vulnerable consumers. This includes personalised offerings and pricing for products and services, and reinforces the disparities in consumer choices effecting all individuals. Some big platform and service providers are operating from outside of Europe with micro-targeting advertising to influence individual preferences and consumer choices.

Because of all this, social polarisation is increasing – not just between citizens with higher-income and lower-income, but also between decision-makers, e.g. in enterprises and those who depend on the decisions of others – between those who have choices and those who do not. People identify themselves with numerous subcultures and lifestyle symbols are manifold and not driven by mass cultural movements as in a decade ago.

4.5.2 Proportion and influence of the two consumer profiles in this scenario

Both the "responsible" and "tech-optimist" consumer groups do not represent the majority of the citizens in Europe. The emergence of the responsible consumers and the tech-optimists during the post-COVID-19 climate action and Green Deal debates in the early 2020s had a polarising effect on the demand side. In 2030, they are no longer polarising consumer categories. Additionally, public debates between their leaders no longer get much attention on social media. Both groups – the "responsible consumers" and the "tech-optimists" – have different values, status items, and use different media, and they view themselves as actively contributing to the climate actions. While for example the "tech-optimist" prefer synthetic or engineered products, the "responsible consumers" tend to buy natural products. For the "responsible consumers" it is rather fashionable to wear washed out second-hand clothes, while the "techno-optimists" prefer to have a new clothing made of recycled plastics with sensors woven in. For the majority of people, these levels of consumer choice are unrealistic, and viewing consumption as a political action is an unaffordable luxury. In fact, social and ethical tensions are rising between these two groups which both aim for reducing the climate effects of consumption although with different approaches, and the rest of the consumers, who do not see themselves as active contributors to climate actions.

4.5.3 Impact on consumption in this scenario

Since 2021, apart from the regulations regarding carbon neutrality, little has changed in terms of political action supporting ecologically sustainable consumption.

Generally, the experience-based consumption is very popular in 2030. However, due to the poor economic situation and high unemployment rates in many European countries, many citizens can only afford cheap, experienced-based consumption, which is in contrast to the more luxurious consumption and lifestyle of the richer citizens. There are, for example, many who do not have a stable income and cannot afford to take time off from work for longer holidays, and therefore spend short holidays close to their living places. The contrast between hedonistic consumption and frugal consumption reflects the relation between financial resources and consumer choices.

The younger, engaged citizen acts as a trendsetter for sustainable consumption. Since sustainable and fair products remain more expensive than products that do not adhere to these standards, only the wealthy citizens, older and younger, can afford sustainable consumption. For the majority of European consumers, and in particular financially vulnerable groups, the price of a product is more important than its sustainability. Viewing consumption as a political action for them is an unaffordable luxury, regardless of their socio-technical values or believes regarding climate action. Statistically speaking, this majority of the consumers who do not have the choice to consume sustainable is female and single, due to the gender pay gap.

Under these conditions, demand becomes even more polarised between those who look for "value" to save money (trading down); and those who look for "lifestyle" (convenience, sustainable products, healthy products) and are ready to pay more (trading up).

Due to a lack of widely accepted sustainability labels, liable information on the ecological or social footprint of products is usually not available. It is often not possible for consumers to distinguish greenwashing from actually sustainably produced products. Replacing instead of repairing used products is still very common. Circular economy products as well as modular or easily repairable products tend to be the exception and are difficult to find.

Yet, greenhouse gas taxes have several effects on consumption in the EU: Air travel and passenger transport have become much more expensive, which is why many consumers have switched to transport by rail and electric vehicles instead and transformed the mobility sector. Electricity from renewable energies has become significantly cheaper due to the CO_2-taxes. As a result, in 2030 many private households and companies are using renewable energies instead of fossil fuels.

Online shopping, which had increased strongly during the COVID-19 pandemic, is widespread in 2030. The number of physical shopping opportunities has further decreased since then. Many retailers, in particular owner-managed ones in city centres could not compete with the many online shopping platforms that started in the early 2020s. In some innovative cities, the former city shopping centres are now transformed into event areas, and most of the shopping centres in rural areas have disappeared. Due to personalisation and profiling technologies, consumers often buy more products online than they would have physically done in a shop.

4.5.4 Impact of the COVID-19 pandemic in this scenario

In this scenario, the pandemic has a long-term negative impact on economic and social equality in the EU. The economy has not recovered properly in many Member States even 10 years after the outbreak of the pandemic. This development has hit the economically weaker states far harder than the other states that had prosperous economies before 2020. The main reason is that the vaccination rates were too low in most Member States, even after a second and third winter with lock-downs and curfews for those not recovered or vaccinated. Some consumption patterns that occurred first during the pandemic persist. While a large proportion of consumers continued to shop almost exclusively online after the first lockdowns, there are people in marginalised social groups who have not been able to embrace this change for a variety of reasons. The openness to data sharing for health, safety, and other communal reasons since the rise of online activities to overcome the lockdowns, are transferred to data sharing across many other contexts.

The pandemic affected tourism in the EU: Self-organised camping holidays are mainstream in 2030, and the number of people spending holidays in their own region is still high.

The economic consequences of COVID-19, especially the global supply-chain interruptions, reduced opportunities to buy sustainable products due to income, and the negative effects of online retail on energy consumption and CO_2-emissions, have hindered the achievement of the EU's climate goals. Because of very high unemployment rates, many citizens could not afford pricier sustainable products, although available in most groceries, online and offline. These increased inequalities across the Member States and the different fiscal strategies to catch-up contributed to the political tensions between the countries. As a result, solidarity among citizens within the countries and among the Member States is waning. Again, Member States are threatening to leave the EU, in particular those with an influx of populist parties due to income inequalities, effects of vaccination scepticism like declining trust in governments and xenophobia.

4.5.5 The scenario in 2025

Many Member States in the EU are still struggling with high infection rates in winter seasons. In addition, natural disasters like frequent severe wildfires and floods are a burden, destroying the livelihood of people in entire regions every year. Inequalities between poorer and richer EU Member States are increasing constantly. In the economically weaker Member States, the social and economic conditions have deteriorated compared to times before the pandemic. The gross domestic product and the average income have fallen sharply in these countries, driven by high unemployment rates higher and minimal social security benefits. In contrast, few Member States that had a strong economy and solid national fiscal policies before 2020 are now almost back to pre-pandemic employment rates as they recover from the economic impact of the pandemic. Therefore, political tensions are rising in the EU. Two more countries have left the European Monetary Union in 2022 and reintroduced their national currencies to counter their economic decline. In order to achieve the Paris climate goals, a greenhouse gas taxing approach is under development. All Member States are investing heavily in building the digital infrastructure for the twin transition.

There is a high demand among the middle-class population to move to greener suburban and rural areas, where possible. Some of them do so because they suffer diseases and allergies caused by environmental pollution, and long-COVID effects, others because they continue to work remote although offices reopened after the pandemic. Therefore, real estate prices and rents are rising dramatically in suburban communities.

The digital economy is developing and AI data analysis pushes personalised products and pricing further, triggered by international platform companies and social media marketing. Therefore, access to the internet is key for consumers and access to consumer data key for service providers. However, although privacy and data-security concerns are still an important topic in public discourse, they are not a barrier to digital consumption for a large portion of citizens.

Sustainable products are available in almost all markets, labelled according to EU-wide standards embedded in RFID-tags directly on the product. However, they are much more expensive than products that do not adhere to these standards. It is difficult for the less online experienced consumers to have access to relevant product information, but the consumption habits of the younger generation are pushing the trend forward. Younger households are also increasingly engaged in local initiatives committed to consumption that is more responsible, but the majority of consumers, which is also aging across the EU, is expecting innovative technological solutions from industry for more climate-friendly consumption and not willing to reduce their pre-pandemic habits.

4.6 Scenario: "Mitigated inequalities and green innovation"

Summary

Many EU Member States have successfully mitigated the inequality increase after the pandemic. Green growth is a successful concept in many sectors, green innovation and green-tech made in Europe are booming. Overall employment is rising, but the structural change towards a digitalised economy also causes job losses in some traditional branches and in rural areas. At the same time, many of the rural areas, which were at risk of being depopulated at the early 2020s, are now revitalised through digital infrastructures and attract young families and people who aim for a responsible and sustainable lifestyle while earning a living through remote work. "Fairness by design" and strict data protection regulations for platforms are implemented to protect consumers across the MS. Consumption is high, yet sustainable consumption is not a priority for all.

4.6.1 Scenario description

Mitigated inequality

After the COVID-19 pandemic, most EU Member States have mitigated the previous increase in inequality with massive support schemes to their economy including different kinds of basic income, research and innovation programmes for a green and digital transition, reskilling programmes, and temporary energy and CO_2-regulations.

Following early experiments with a kind of basic income and minimum wages in some Scandinavian countries or the Netherlands, in 2030, most Central European countries have implemented legal instruments for a minimum wage. In addition, the Member States have implemented action-specific, participatory platforms to increase learning from income policy experiments and experiences.

These activities have reduced income inequalities and consequently have positive impacts on social inequalities and affordable living and housing for the majority of the citizens. Several EU cross-border regional development programmes are installed, targeted at rural areas and shrinking cities with effective allocation criteria and focusing in particular on the protection of vulnerable groups to mitigate inequalities. Surveys show that there is a strong belief among the EU populations in 2030 in the ability of their national political systems to handle major complex challenges – the strongest belief since the COVID-19 crisis.

Economic growth through green innovation – the Green Growth

Overall, the European policy-mission towards renewable energies in all industries is almost accomplished. In 2030, the EU economies are finally experiencing the expected economic growth through green technology, the successful shift away from the fossil-based economy towards a sustainable bio-economy. Private and public investments in research and innovation for the Green Transition are higher than a decade ago in most EU countries. Clean energy production, distribution and use has improved in the main industries, often based on hydrogen technologies. Circular economy is the key business model, triggered by digital technologies such as the application of smart sensors, machine learning and Artificial Intelligence, smart materials, the Internet of Things (IoT) and the like. Firms in many sectors not only drive but also benefit from the successful green growth, strongly intertwined with the digital transition.

Consequently, employment and income rates are high in the EU, and the differences between Member States have decreased. More and more Member States have started to measure economic growth as decoupled from resource consumption, with GDP supplemented by several environmental and social sustainability indicators.

Income inequality is low and private spending is high

In many EU Member States, there is less income inequality and higher disposable income for a large share of the population, compared to the situation in the early 2020s. In addition, housing prices sunk in recent years, because of sustainable, CO_2-neutral housing programmes.

Most of the younger people, who were teenagers during the COVID-19 pandemic, have successfully completed their vocational training or studies. The fear that this generation could be a "lost generation" has not come true. Instead, the young people of today in 2030 have the potential to advocate a globally fair world and to commit themselves to a social and environmentally sustainable EU.

Many work from home, but not everybody can or wants to

Remote work and online learning are part of the life of all citizens, but the level of interest in remote activities differs between European countries. In general, the interest in working from home is high; if possible, people work partly or fully from home. However, – for different reasons – not all citizens are able to do so. For example, people working in caring, construction and personal service jobs, cannot work from home.

People working from home need high-speed internet access, technical equipment and home office furniture as well as quiet areas in case they are living together with others. These are common features of modern homes in urban areas. At the same time, people are well aware of the concomitants of intense remote activities as many people suffer from feelings of isolation or health effects like myopia, lack of sleep, back problems etc. More and more offices, public and private spaces today in 2030 are designed to mitigate these effects.

Some rural areas get revitalised

As most people order their products online, logistics have to ensure comfort, privacy and efficiency for those who can afford it. However, this is a challenge for many people who live in rural or suburban areas. They have moved out of the city centres for different reasons, e.g. improved internet access in rural areas for remote work, the desire to live closer to nature, or to enjoy outdoor activities. Yet, the density in cities is growing, green spaces are decreasing and cities are experiencing higher average temperatures. Some cities already suffer from "urban heat areas", where it is difficult to live. So, some people also move out of the cities because of health problems like allergies caused by air pollution or urban heating.

National governments support the development of decentralisation after a long period of decay, also because of the structural funds implemented after the pandemic and the numerous natural disasters like floods and fires, in order to revitalise the regions. Thus, decentralised, digitally connected settlements tend to become the norm, where remote work is standard.

Many rural areas are revitalised today and in 2030, some are among the global hot spots for new forms of collaborative innovation and consumption. Business co-working spaces, sports and cultural venues develop outside of city centres in locations with public transport nodes. Some rural communities along the countryside are campaigning for inhabitants from the city centres to their community.

"Fairness by design" on platforms

In response to data collection and user profiling by online platform providers, the EU has adopted its European way of using responsible data spaces and test fields for fair and inclusive Artificial Intelligence right after the pandemic crisis in the early 2020s. Now, online platforms face strict data protection regulations and consumers can opt-out of sharing their data for marketing or personalised advertising.

An EU framework programme against misinformation

In 2030, the use of social media is still a mainstream source of news and information; public broadcasting companies offer their programmes online on social media platforms and on joint EU-wide platforms as streaming services for video and audio. Fake news and protest movements influenced by conspiracy theories are a challenge for democracy since the pandemic, but not as they have been during the COVID-19 crisis. To fight this, the EU has established a framework programme against misinformation with national centres, in order to balance media and social media posts for information and to protect citizens from misinformation.

However, an over-abundance of information makes it hard for people to distinguish trustworthy sources from fake news or fake sources.

4.6.2 Proportion and influence of the two consumer profiles in this scenario

In this scenario the "responsible consumer" is an important driver for consumption, but not dominant across the EU. In some wealthy city areas and suburbs, they represent the majority of the consumers, but this is not the case at national or the EU level. One reason is that such a lifestyle requires sufficient disposable income to pay the higher prices for sustainable and eco-products, including climate-neutral mobility and housing. Yet, the group of responsible consumers includes a large part of the younger generation aged 35 and younger in the EU, in particular those with digital skills, higher education and thus potentially higher income and career options. In addition, there is a higher degree of civil engagement among them. The lifestyle of the responsible consumers reflects their understanding of the interrelation between natural resources, biodiversity and personal well-being.

The group of tech-optimists is spanning over all ages and not willing to pay higher prices for sustainable products. They have become a dominant consumer group across the EU and count on politics to put in place the actions and measures needed to fulfil the green transition –and at the same time benefit from the digitalisation of the economy and society.

4.6.3 Impact on consumption

In 2030, consumption is high, with less difference between the Member States than a decade ago. The mitigation of inequalities in Europe, together with targeted consumer policies have a positive effect on sustainable consumer behaviour across the EU.

A high disposable income for a large share of the population leads to a generally high demand for consumer products and consumers in cities and urban areas tend to pay higher prices for more sustainable products. However, sustainable consumption patterns remain one of the biggest challenges to the Green Growth, as there are several rebound effects of higher income related sustainable consumption. The majority of the Europeans define themselves as "sustainable actors", but for most of them their ecological footprint is not fully sustainable (also due to a variety of definitions for sustainable and eco-consumption, rebound effects, the intense online activities with delivery services and energy-consuming digital technologies, e.g. blockchain and the digital Euro).

Furthermore, a prerequisite for a sustainable lifestyle is to have enough disposable income adapting to the high prices for sustainable and eco-products, including climate-neutral mobility and housing. This is not possible for the majority of citizens in Europe and sustainable consumption is not a priority for all.
In some European Member States with above EU average income rates; there is a trend to buy more ecologically sustainable and local food products, whereas in other European countries sustainable food and diaries from local producers is not available for all or not of equal importance for consumers. The trend among

young people in sustainable, responsible consumption and caring for issues like climate change or planetary boundaries has not reached critical mass, yet. Nevertheless, this group could set the trend in sustainable, responsible consumption in the end.

Overall, remote activities (working, studying, shopping, etc.) are part of the life of all citizens and people order most products online. There is a duty of "fairness by design" for the platforms with strategic market status. Because of strict data protection regulations, consumers can opt-out of sharing their data for marketing or personalised advertising and consequently personalised prices – and some do. Furthermore, public-private partnerships have created local and regional data co-operatives in Europe, often across country borders, allowing for experimental, participatory innovation activities such as living labs for green urban technologies. Innovative products and services from these labs respond to current diverse needs of consumers and not to consumption patterns of the past.

4.6.4 Impact of the COVID-19 pandemic in this scenario

The experience of the pandemic has pushed anticipatory governance in support of the twin transitions. The policy measures around and quickly after the fast uptake of the digital economy, in particular digital consumer rights for European online platforms was a catalyst for the green transition and innovative business models to support the economic recovery in the Member States. Several laws and regulations for climate neutral technologies, products and business practices were introduced successfully across the EU economies. Yet, it takes some effort and time to negotiate the measures and regulations for climate-neutrality in all sectors between the Member States.

Furthermore, several EU countries started political measures such as basic income to protect vulnerable groups during the difficult post-pandemic times. Most of these programmes led to less income inequality and higher disposable income for a large share of the population, compared to the situation in the early 2020s.

The framework programme against misinformation with its national centres is successful. It has been established as a response to the populist media activities during the pandemic in order to balance media and social media posts for information and to protect citizens from misinformation.

4.6.5 The scenario in 2025

Directly after the COVID-19 pandemic, most EU Member States have mitigated the inequality increase with massive support schemes and funds including research and innovation programmes for the Green and Digital transition, reskilling programmes, and temporary regulations. In addition, EU-wide action-specific, participatory platforms have been built-up in 2022 to share experiences and increase learning effects from co-creation experiments for the twin transition and from basic income testing. The respective programmes and initiatives in following the pandemics have resulted in better social integration of vulnerable groups, including new types of EU cross-border regional development programmes. After mitigating the pandemic crisis successfully, many EU Member States now seem to be more resilient to shocks like natural disasters which occur more often now due to climate change. Aid funds and support infrastructures are more effective than before the pandemic. More and more Member States are starting to develop new measurements for economic growth as decoupled from resource consumption and experiment with indicators supplementing GDP.
The income inequality is higher after the pandemic, and consumption is rising again. Housing prices are immense, and some EU Member States have started programmes for affordable, sustainable, CO_2-neutral housing. The possible effects are unclear yet.

The shift away from the fossil-based economy gains momentum because of the EU policy-missions based on the Green Deal, in particular the gear towards renewable energies in all industries.

It is difficult for young people to adapt to a new normal in education, enter the job market, and accept the many new rules implemented on citizens. The unemployment rate is still high in many sectors and for younger people. There is a fear that the young ones are a lost generation as they missed at least two years in education and training as well as in social activities. Many citizens would like to remain working from home, but not all can and most employers want their personnel back on site.

Consumption is rising in all Member States after the recovery from the pandemic lockdowns, and continues to move online. Logistics are a challenge to urban areas. Cities have to re-invent their city centres as many retail stores have disappeared, offices need less space and new post-pandemic concepts for space and safety are needed. A main barrier for the twin transition and further increase of consumption in the digital economy is a lack of digital infrastructures in many rural regions, but the situation is improving. The trend towards experiencing nature and outdoor activities from the early 20s is continuing. Land prices at the outskirts of urban areas in Central Europe are drastically rising. Mobility and travelling for fun are back after the pandemic. People are hungry to see other places and spend more money on travelling; yet, the number of flights has decreased compared to 2019. "Green travel" is a niche market but on the rise. Mobile homes, caravans and camping are still booming.

The EU has recently adopted the second phase of the specific European programme to built-up test fields for fair and inclusive Artificial Intelligence innovations. Phase one started right after the pandemic crisis in the early 2020s and was a success. The European GDPR rules are copied in several countries around the world, in particular in India. Fake news and protest movements influenced by conspiracy theories, which rose in the pandemic are still a challenge for democracy. To fight this, the EU is currently establishing a framework programme against misinformation with national centres, in order to balance media and social media posts for information and to protect citizens from misinformation.

4.7 Scenario "Inequality to the breaking point"

Summary

Income inequalities in all Member States significantly increased the social division between wealthy households and those struggling with no or little income is at the highest rate since decades. Most economic systems in the EU focus on GDP-growth. Only very few countries are on their way to implement a post-growth-oriented economic system, which they have started to experiment with during or right after the COVID-19 pandemic. For the rest of the countries, post-growth ideas like frugal consumption were just a hype. Climate change causes a lot of irreversible damage, bringing the social welfare systems of national economies to its limit. Many citizens are working, learning, getting entertained and interacting with others online in augmented realities. They use digital twins of their life, provided by global platform companies. This has led to a data capitalism without any real guarantee of data protection and privacy for citizens. The level of consumption among European citizens is high and a key factor for their social identity. Most consumers believe that they can achieve the sustainability goals only with the help of innovative technologies; the tech-optimists are trendsetters in consumer behaviour.

4.7.1 Scenario description

High inequalities and significantly increased poverty led to social division

In 2030, income and social inequalities in the EU are at the highest level for decades. The EU Member States suffer from necessary public spending during and after the COVID-19 pandemic and natural disasters like flooding rivers and forest fires. As a result, budgets reached their limit in all countries and social benefits are broadly limited. In addition, household savings are low among the majority of the population. This means that most strategies have failed to reduce inequalities and induce economic growth after the pandemic of 2020, the reasons differ between Member States.

European economic systems focus on GDP-growth; post-growth ideas were just a hype

The classical definition of a GDP-focused growth with investments and profits to keep the economy running is still dominant in the EU. Due to the post-COVID-19 crisis and necessary policy measures, the inflation across the Member States has risen sharply. Despite positive economic growth-rates since the last couple of years in many EU countries, inequality of income is still rising. Therefore, many consumers refuse post-growth approaches, in particular for sustainable behaviour as discussed in the post-pandemic years. Populist parties in addition deny climate change and claim that voluntary frugality for a more sustainable lifestyle is an ideological concept. They use it as an argument against diverse but small movements for responsible lifestyles and consumption to fight climate change. In 2030, it seems as if de-growth concepts, which had been discussed before the pandemic, have failed.

Climate change has caused a lot of irreversible damage

CO_2 emissions have risen dramatically and faster than expected, e.g. in the environmental assessment and consumer reports ten years ago. The reason is that European consumption of energy is higher than ever. Global NGOs and experts are warning constantly on social and traditional media that the green transition is still the main societal challenge in 2030. They demand for more incentives to support the transition towards renewable energies, for improvements in energy efficiency, and to build up the infrastructures for the twin transition. One reason is that the short-term effects of the 2020/2021 crisis with a reduction in energy demand during the lockdowns or in lowering carbon emissions due to disrupted production, logistics and mobility disappeared completely. Climate change has caused irreversible damage across Europe and globally, e.g. new deserts in the South, and decrease of biodiversity in coastal regions. Investments in rebuilding destroyed districts after floods, storms and fires have increased public debts and spending for structural funds. The climate actions adopted in China and in the USA, leads to the loss of technology leadership of European firms in lead markets in the USA and Asia, which severely affects European industrial production, competitiveness on international markets and income.

Income inequalities have increased social disparities

The inequalities of income, including gender pay gaps in the economy and politics, together with other forms of discrimination (age, sexuality, etc.) add to the social disparities in all Member States. There are people who have easy access to the internet, social life and cultural activities, to health infrastructures and education and those who do not. The inequalities are one of the main issues in election campaigns in the Member States and led to successes for populist parties. They are in the government in most of the Member States and play their role in social unrests that recently reappeared in several parts of Europe. This all contributes to social polarisation in the EU, with a widening gap between the people with higher income, the shrinking middle-class, and different vulnerable groups. In addition, conflicts between cultural and ethnic groups are increasing due to populism. There is a real risk that the society in the EU reaches a tipping point of political stability if more crises emerge more frequently and add up, like pandemics and natural disasters caused by climate change.

Social identities in a fragmented society

The society in the EU is fragmented in 2030. Generally, for European citizens, status goods are a key factor in terms of their social identity. The more status goods like mobile digital devices, branded clothing and accessories, cars, sports equipment and properties they have, and the more they share it on social media, the more they feel their social status is boosted. For example, for those who have the money, travelling is of great importance – the more expensive and exotic the destination, the better for them. The climate and environmental impacts caused by travel are not seen as an issue in most public debates or social media. Social media celebrities are highly influential for all generations, when they combine fast or luxury consumption with political statements. However, most of them do not address consumers' roles in climate actions and sustainability.

Most citizens in the EU are not willing to reduce or change consumption because of climate change. Instead, in particular the older generations who suffer from pension cuts believe that the governments and the companies should take the climate actions. A small number of young people, in particular students in urban areas, are engaged in different follow-up initiatives from the former "Friday"-movements. Although they do not represent the majority of the youth, they have some political influence when they link their actions to digital media and platforms across the EU. However, they are not the typical young people in 2030. Sociologists use the term "fractured youth" to describe the European young generation. The generation who lived through the pandemic of 2020/2021 as children and teenagers suffering under the restrictions and lockdowns, are now suffering the post-pandemic barriers in job training and markets, income and housing. Many feel pushed into a passive role and dependent on the help of others since the pandemic and call themselves "the lost-generation of 2020".

To sum it up, the society face immense social and financial inequalities in 2030. It even seems as if many of them have given up, believing that there is nothing to fight for, anymore.

Digital divide and social disparities

The shift towards remote activities (working, studying, and shopping online) since the pandemic in 2020 changed life of all in a way most people did not expect: it crystallised social and financial inequalities between citizens and between European Member States. For example, in 2030 in some cities in the EU, in particular in the capitals, many of the social, political and cultural public activities are happening in augmented realities (AR) on local platforms, interconnecting the physical and digital world. In these few regions, characterised by access to 5G for all, office work as well as education is often taking place remotely. Although the digital infrastructure in the EU is massively supported by governmental investments, the prerequisites for remote work such as 5G are not available in most Member States of the EU yet. Especially in regions of lower population density, the internet connection is not sufficient. Additionally, the access to digital possibilities is related also to financial resources. As many citizens in Europe have limited financial resources, they cannot make great use of digital opportunities like working from home, online shopping, entertainment or education. Generally, cities are attractive to live and work in. Some cities have become innovation hotspots with high-end augmented-reality spaces, but they are very unequal in terms of the housing and financial situation of the residents.

As many services of daily life are offered only on digital platforms in 2030, large parts of society in remote regions of the EU will not have access to them for various reasons: a lack of digital skills, a lack of digital devices, broadband or mobile access, no disposable budget for such activities or else. These people feel excluded from the group of successful "profiteers of digital possibilities", or even feel left behind by the government.

Increase of population in suburbs, losses in rural areas

Floods, storms and fires have destroyed settlements in several regions in the EU and led to migration into urban areas. The increase of population in suburbs and losses in rural areas affect the housing and property markets. In addition, the citizens experience an impact of digital activities on housing. In some regions, the communities rededicate former public administration and office spaces (including public schools) to co-working and co-living spaces. As more and more high-income citizens work from home in urban areas, the demand for homes that they can use more flexible for living and working activities is high. For some people working remotely also means that it is not necessary to live close to their employer – or that they need office spaces in case of being self-employed. These citizens prefer areas with cheaper housing, as long as they have internet access and sufficient bandwidth. Due to well-established cross-border working arrangements, some people now live in countries with lower costs of living, but work for an employer from another European country, for which they also pay their income taxes. In comparison to that, the majority of the European society – in particular citizens with lower income, at risks of becoming vulnerable, or being physically bounded to their place of work – are not that flexible in their place of living. These people do not have the freedom to live wherever they want to.

Social disparities in cities and between wealthy cities and poorer cities as well as between wealthy and poorer rural areas are high. They compete for specialists and personnel, for cultural offers and for people to move in. Some rural districts lost population that spends money on shopping, education and culture, as more people are moving to cities. Consequently, in many rural districts poverty increases.

Data capitalisation is gaining importance

In 2030, data capitalisation is key – in all sectors and for all services and consumer product markets. People share their data while shopping online. The collection of consumer data on single platforms or across a digital ecosystem amplifies the power of companies to create micro targeting that influences individual preferences with personalised offers (via data and architecture interfaces). Online platforms deploy sophisticated Artificial Intelligence software for the analysis and prediction of consumer behaviour and exploit consumers' psychological weaknesses.

Some citizens' demand for more transparency and control over their shared data. There are few test and experimentation fields for sharing data and innovation capacities in local or regional data cooperatives. Several EU countries have tested new ways of regulation for personalised pricing and offerings, and the results and lessons learned are discussed in the EC.

Fake news and misinformation are a major problem in 2030. Overall, most people do not trust media sources. This trust decreased since and after the COVID-19 crisis. There were attempts for new regulation like an EU framework on misinformation – but the practical control of the regulation turned out to be too expensive and capacity binding. The EU cannot keep up with the influential and technically advanced platform companies.

4.7.2 Proportion and influence of the two consumer profiles in this scenario

Looking at the two types of consumers in this scenario, both groups gained more relevance in the early years after the pandemic, but in 2030 only the "tech-optimists" are playing their role in shaping consumption patterns in society. The "responsible consumers" are only acting in niches and are characterised by younger, well-off urban citizens. Most people do not want to reduce or change consumption because of climate change and believe that the government and the companies should solve the climate and environmental problems.

4.7.3 Impact on consumption

The richer part of society in 2030 is spending and consuming more than ever, mainly in luxury products, housing, digital markets and stocks. Prices for consumer products are high, and sustainable or fair produced products are considerably pricier than conventional ones. Many consumers, who have low or no regular income simply cannot afford sustainable products. In particular, the financially vulnerable population who live in cities with sharply rising rental prices have no financial resources to consume beyond what is necessary.

The majority does not want to reduce or change consumption because of climate change and therefore sustainable consumption is generally low. Many consumers refuse post-growth and frugal consumption approaches. Frugal consumption, if practised at all, is happening out of necessity – and this means real life for the majority of the population. The European market share of products labelled as socially or ecologically sustainable therefore remains low. In addition, there are no uniform European sustainability labels, which makes it difficult for European consumers to compare products with regard to their sustainability performance. Products that have a modular design or are produced based on circular economy principles are hard to find for European consumers.

For European consumers, a high level of consumption is a key factor for their social identity. Those with financial means travel a lot, ignoring the climate and environmental impacts caused by travel. As a result, European air traffic and passenger travel remain high and the European automotive industry is flourishing.

Renewable energies are usually more expensive than energy from fossil sources. Private households and companies therefore see little incentive for consuming products or services based on renewable energies.

The proportion of European consumers who primarily shop online is high since the pandemic years, which is why many physical stores had to close down in the early 2020s. Vulnerable groups such as older generations or people with specific needs often do not have the appropriate digital skills and internet access to shop online. Moreover, they often have difficulties to reach far-away physical shopping opportunities. In particular, the population in regions of lower population density, in which the digital infrastructure is poorly developed, is partially excluded from consumption. In addition, many of the social, political, and cultural events are happening in augmented realities (AR) on local platforms, which also excludes the population group without the necessary digital skills or the necessary end devices to participate.

For those who use e-commerce, it is difficult to avoid platforms with insufficient data policies due to a lack of transparent information or alternatives. In most cases, they accept it or welcome benefits of convenience. Targeted advertisements as well as personalisation software are prevalent. Some European online consumers feel that they are deprived of what they want to buy, which prices they have to pay or to what they have access to (e.g. be eligible for receiving a loan, an insurance etc.).

An over-abundance of information – some accurate and some not – makes it hard for people to find trustworthy sources and reliable guidance when they need it. For European consumers it is therefore hard to make an informed decision. The increase of population in the suburbs has huge effects on consumer behaviour and demand for logistics, delivery and mobility – especially on the countryside.

Overall, it seems as if the consumers in the EU want to compensate for the inequalities in social life through consumption.

4.7.4 Impact of the COVID-19 pandemic in this scenario

The post-pandemic struggles and the increase of natural disasters have disastrous effects on the entire economic situation in Europe. Despite attempts to counter this with policies, many European citizens live in poverty. The costs for the Member States to bridge the gap between rich and poor citizens or to limit the immense inflation since the pandemic in 2030 are too high, public debts are rising and limit the financial possibilities for welfare programmes. The attempts to achieve the sustainability transformation seems to have died down in the MS, simply because economic and social inequalities are of higher priority. The lockdowns and restrictions during the COVID-19 crisis have boosted the digital economy and online activities in all areas of private, public and work life. Online shopping, education, and work are widespread in 2030. Consumption is high and there is a strong demand for sustainable products and services, as long as they can be purchased online for those who can afford it. In 2030, people realise that the COVID-19 crisis leaves a "lost generation": The children and adolescents that experienced the restrictions and lockdowns 2020 to 2022, in some countries due to vaccination refuse even until the mid-2020, are suffering from the poor education during home schooling and of limited job and training opportunities in post-pandemic times. Many feel forced into a passive role and dependent on the help of others, and consequently have little trust in governments who fail improving their situation. The pandemic has severely shaken trust in public information and media, social disparities between people following green, social and liberal parties on the one hand and those who support extreme nationalist and populist parties on the other hand are large.

4.7.5 The scenario in 2025

The European Stability Mechanism and specific aid programmes to protect jobs and companies are at place to limit economic damage caused by the corona pandemic. In some Member States, the efforts are successful and help to drive economic growth, but in most cases, so far they have not been successful in reducing inequalities. The inflation across the Member States is high. Sustainable consumption and the green economy as key actions against climate change continue to be discussed on the European agenda, but become less important given the overall economic difficulties faced by the Member States.

The expansion of renewable energy production is levelling out and the consumption of energy is generally increasing. The short-term effects of the COVID-19 crisis with a reduction in energy demand during the lockdowns or in lowering carbon emissions due to disrupted production, logistics and mobility disappeared completely. The CO_2 emissions in the EU are rising dramatically. Extreme weather as symptoms of climate change like storms, droughts and wild fires are getting visible.

The gap between people with higher income and the shrinking middle-class is deep. The increase of different vulnerable groups leads to successes for populist parties. In addition, the young generation suffers badly from lockdown-induced deficits in education and training and face barriers on the job and housing markets.

After the pandemic of 2019-2021, many remote work, education or consumption activities remained, at least in areas with sufficient broadband infrastructures. More and more social, political and cultural public activities, like e.g. education or government services continue to take place online. In some regions, public and office spaces in buildings are not in use anymore and offices are left empty.

Some cities have started programmes to reinvent their city centres and have the potential to attract innovation hotspots with high-end digital infrastructures for co-creation with citizens, researchers, artists, companies and service providers. In some rural areas, natural disasters have increased poverty, and people have to leave the regions and move to cities or suburbs.

The big and dominant online platforms deploy sophisticated Artificial Intelligence software for the analysis and prediction of consumer behaviour. Since the COVID-19 crisis, more and more people loose trust in public authorities and become vulnerable to misinformation. Populist movements and parties are still on the rise across the EU Member States.

5 Gap Analysis: visions and actions needed for the achievement

In this step of the foresight exercise, the scenarios were used for the analysis of policy gaps between todays New Consumer Agenda and the visions to be reached in post-pandemic time in 2030. It is crucial for the assessment of scenarios to consider different perspectives from stakeholders. For this reason, two workshops were carried out online with experts and stakeholders in June 2021.

5.1 Methodology: visions of desirable futures

The scenarios developed describe four possible and plausible futures. They are not predictions of the future; they reveal the space of possibilities. The first scenario "United for a more sustainable, inclusive and resilient society" seems at first glance to represent a desirable future. However, there are also elements in the other three scenarios that may be more or less desirable from a certain stakeholder perspective. The scenarios are therefore not narratives of desirable futures, but rather neutral descriptions of how the situation can develop differently depending on the framework conditions. A scenario that seems less desirable provides valuable clues as to how this could happen and what could be done to mitigate the negative developments.
In order to develop a future-proof strategy, the risks and opportunities across all scenarios have to be identified, their underlying **visions** extracted and policy options to meet the visions be developed. A vision is a desirable picture of the future. It does not have to be 100% realistic but it is supposed to lead to actions/policies towards this direction.

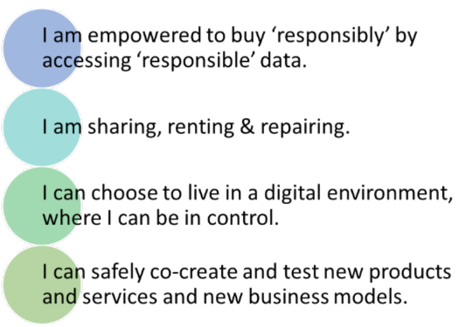
Visioning is a participatory foresight approach for developing shared visions of the future. It is an important step in creating a strategy to achieve a desirable future or a particular purpose. In the visioning exercise of this project, stakeholders and experts were invited to bring in their specific perspectives and experiences, first to discuss desirable elements across all scenarios in a visioning workshop, and secondly to identify barriers of a future pathway to achieve the visions.in a gap analysis workshop. The participants discussed the commonalities and differences of the scenarios, as well as challenges for consumer protection and empowerment. The outcomes of the gap analysis are

- Four concrete visions for the future of consumption from the European consumer's point of view.
- Seven fields of action that stakeholders, experts, and the EC consider particularly important for achieving the visions despite the socio-economic impacts of the COVID-19 pandemic.

5.2 Visions on European consumer behaviour, consumer protection and empowerment in 2030

The four visions describe some preferable situations and goals as to what consumer policy, consumer empowerment and consumer protection in 2030 should look like (Figure 9). They are geared towards a future in 2030 that will be shaped by two major developments: the digital transformation and the green transition. The unfolding of the twin transition is already affected by the current COVID-19 pandemic and its long-term impact on society and the economy. In the description of the visions and challenges, there is a focus on how they can be achieved for all groups of consumers, including vulnerable groups and groups with specific needs.

Figure 9: Four visions on European consumption in 2030



Source: FoD consortium

5.2.1 Vision: I am empowered to buy "responsibly" by accessing "responsible" data

To make conscious and responsible decisions for sustainable consumption, the consumer needs barrier-free access to all relevant information. Consumer empowerment and personal information sovereignty ensure a consumer's right to access the relevant modules of "responsible" information they want about a certain product to make a "responsible" purchase. The information should be easily accessible, accessible at various levels of granularity so that they can choose (for example – composite "responsible" indicator (red/ yellow/green for example), category description, and detailed description) if they want this information. If people are not interested in this type of information, they should be able to see only key data on label including a composite "responsible" indicator. A digital tool must be available to consumers to access this data and make products, user-friendliness and impact of their consumption comparable.

Tracking resource and product flows in real time provides consumers with a solid database for informed and sustainable decisions. Making this data publicly available empowers consumers to sustainably influence the market through their consumption behavior and hold global corporations accountable for environmentally and socially harmful practices. That way enterprises can also differentiate themselves or not around "responsible" criteria. Areas of information cover a wide range, for example, from raw material sources and product origins to value-added along a supply chain to the various social, political, economic, and ecological impacts associated with all of these activities. What will be the estimated impacts of consuming a certain product (environment/social/etc.)? Will it require more resources than a comparator? Can the product be repaired or recycled? How safe is the product? What knowledge level is necessary in order to use it? What is my responsibility as a consumer? What responsibility do the producers/sellers bare?

- **Vulnerable consumers' dimension**
  How easy is it to use for vulnerable/disabled people relative to their disability/vulnerability type? How accessible is customer service to disabled people relative to their disability type?

5.2.2 Vision: I am sharing, renting & repairing

This vision takes up the idea of sharing and renting products that are used infrequently or short-term and giving away/repairing/buying/selling old or broken/repaired ones, informally as well as institutionalised, for example, as in second-hand markets or through dedicated platforms. Although this is not a new idea at all, as a vision it calls into question the dominating urges of our society to buy something new and industry to create things designed to become obsolete. These activities point in the targets of the Green Deal and emerging business models of a sharing economy that mature in the society.

Over the last ten years, there has been a lively discussion on the rental/sharing economy. People do not necessarily want to own a car even if they want to travel or go somewhere, especially if they do not use a car frequently. Car-owners are ready to reduce their trip cost by sharing the journey with other people. Many people are members of car sharing platforms either as passenger and/or car owner. Some car sharing organisations are commercially organised and others are non-profit. However, experience has shown that this up-scaled with commercial platforms rather than sharing platforms. People share/rent tangible products such as houses, food, appliances, clothing, gardens, bikes, cultural artefacts as well as intangible/ experiential services such as information, knowledge, and music. This approach demonstrates the appreciation for goods and services, their value and the work and energy that was needed to create and produce them.

In a similar vein, repairing and upcycling old, broken or second-hand products is becoming more and more popular. Repair shops, design shops, informal neighbourhood and similar initiatives emerge to prolong the life of goods, reintegrate them in the consumption cycle, avoid waste and save money. Rental and sharing as well as giving away, repairing, buying or selling second-hand goods represent more than an economic choice: they can embody a sustainable lifestyle. Policies in support of such initiatives are essential to give the rental and sharing, giving away and repairing or buying second-hand aspects of consumption more room for unfolding their potential.

- **Vulnerable consumers' dimension**
  People should be easily able to be both consumers and prosumers, and should have access to the sharing and repairing infrastructures, wherever they live.

5.2.3 Vision: I can choose to live in a digital environment, where I can be in control

Digital experience is increasingly personalised by enterprises and consumers. This experience is mass-produced but can be modified by enterprises to meet consumer preferences through existing data about the individual and its choices. This experience ranges from personalised advertising to personalised shopping experience and results in personalised pricing. Platforms make use of cognitive biases for experience design and combine it with consumer profiling. This can range from past shopping data to purchasing preferences and to psychological profiling (emotions recognition for example). The consumer is often passive about this overall process and does not have a chance to object or refuse it. It creates a real risk for the consumer to be pigeonholed into a digital bubble. This development has accelerated since the beginning of the COVID-19 pandemic as people buy more online now. This can reduce the choice of the digital offer in comparison with the "physical" offer that a consumer could see in a store. Consumers should have the right to request a "neutral" digital experience equivalent to walking physically in a store if they wish to.

- **Vulnerable consumers' dimension**
  People with disabilities or vulnerability should be able to have equal choices. In this vision, anticipating the various capabilities of different user groups happens in design processes together with different groups. Vulnerable groups are not considered marginal. Anybody who gets older will experience a change in demands of products and their usability, for example. User-centred design includes the digital dimension. Not every user has the same skills to master the ambitious challenges of AI applications and services. Producers and providers must not take advantage of different digital capabilities of their users. Young consumers need as much protection as the elderly. By making products user-friendly for different life situations and personalised to the user demands, products can better serve the independence of their consumers: from the market dominance of multi-national companies, from patronising authorities etc. It is important that not all communication is digital but that people can use low-tech artefacts independent of IT networks at any time.

5.2.4 Vision: I can safely co-create and test new products, services, and business models

This vision revolves around the pro-active consumer of the future as an integrated part of the innovation and product design process. This approach makes the products customised and more user- and environmentally friendly for all groups of consumers. The innovation process opens a dialogue between user and producers where the user can be integrated in the development, improvement or testing of a product at different stages and to different degrees. Users also take the role of testers of beta versions to give feedback for optimisation. Users are not only co-creators but also initiators of innovations and new products; they get together in real or virtual labs to co-create products. User-friendliness and customisation are not the only incentives for users to participate in innovation activities for new products. Users also want to make sure the products they co-develop and consume embody their values and reflect an understanding of the links among natural resources, biodiversity and personal well-being. Young people in particular are engaged in co-creation because they want to reduce their personal footprint and insist on fair and sustainable products and services along value- and supply-chains. Because of pro-active consumer engagement, management of knowledge systems for innovation becomes increasingly vital. Co-creation is a particular form of combining user and producer knowledge and values. It relies on the expansion in the stock of knowledge and on increased connection, e.g. on the integration of the principles of networks, complexity and self-organisation in the management of knowledge. Life-long learning resources are broadly available, making knowledge navigation a widespread capability. These life-long learning resources are designed and organised to encourage collaboration skills. Most knowledge processes are collaborative, capitalising on group intelligence and engendering collective metacognition. Co-creators' and testers' role is recognised by enterprises. Different levels of testing are recognised with relevant levels of liability/rights accordingly so that products and services can be rapidly tested and co-created in Europe while providing key assurances to consumers. Consumers should be able to co-create and test safely new products and services as well as new business models. When new technologies, business models, and products are tested and risks cannot be assessed, enterprises and consumers should be able to draw on a mutualised risk fund.

- **Vulnerable consumers' dimension**
  People with disabilities should be able to be involved in co-creation and testing, in order to make products and services user-friendly and accessible to all types of consumers and make vulnerable people independent as much as possible.

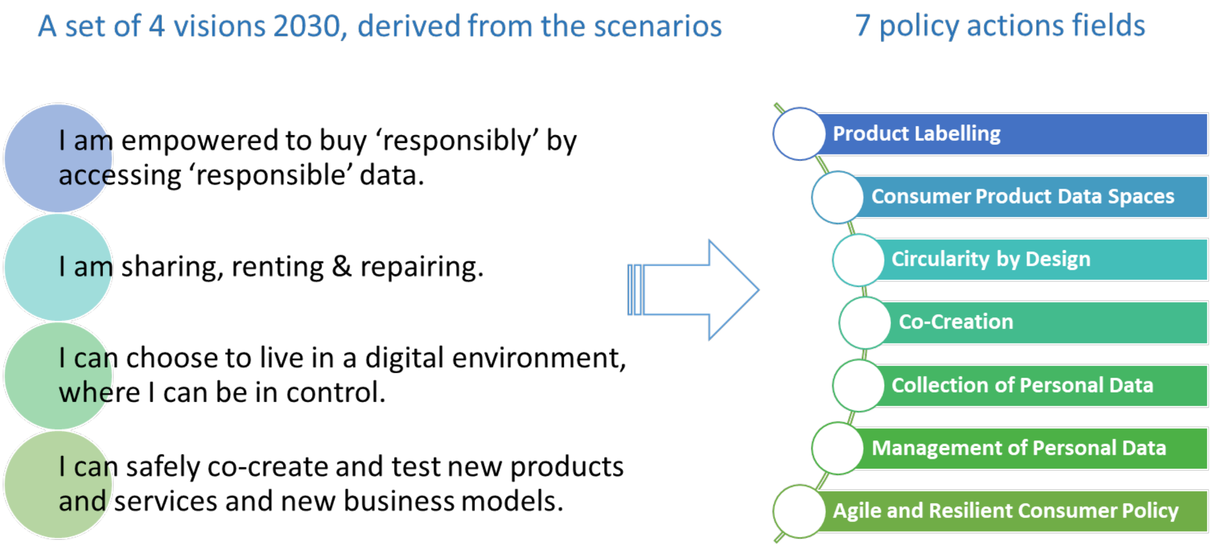
6 Policy Implications

This chapter presents the outcome of the foresight process: ten suggestions for policy actions that complement the New Consumer Agenda to address the impact of COVID-19 on consumer behaviour and consumer protection, especially for vulnerable groups. As they have been developed in several workshops together with stakeholders from different regions of the EU and experts from different disciplines, they show where there is a particular need for action to make the policy future-proof from a stakeholder perspective.

The policy implications have been developed in the following steps: First, the study team identified gaps between the visions and the possible futures from the scenarios and the corresponding fields of action for measures. The vision elements and necessary action areas to address them were used in an EU-wide online survey to get stakeholders to comment and prioritise them. In addition, participants were able to contribute their own ideas for policy actions. The results of the survey were then analysed, discussed and further elaborated in a workshop with high-level stakeholder representatives and EC colleagues.

The invited stakeholders have identified seven policy action fields for achieving the visions (Figure 10).

Figure 10: From visions to policy action fields



Source: FoD consortium

For each action field, stakeholders from consumer organisations and industry have outlined one or more ideas for concrete policy actions in co-creative workshops together with experts. The stakeholders and experts who participated in the foresight project believe that urgent action is needed in these areas to protect and empower consumers in light of the changes in consumption caused by the pandemic.

One of the most important impacts of the still ongoing COVID-19 pandemic on consumer behaviour is the massive increase in online shopping – for everything from food to clothing, sports equipment and bicycles to streaming music and movies. It is therefore not surprising that most of the suggested policy ideas are in one way or another related to online activities. How could the consumer policy of the EU protect and empower vulnerable groups in the virtual shopping world at an early stage?

The seven policy action fields presented here are explored in different lengths, as some of them cover not just one but several complex consumer aspects, while others touch on aspects that are better delineated and already more common in our everyday lives as consumers. Six of the policy issues are **content related** and the seventh issue is crosscutting and **process-related**. The presentation of each issue also includes an explanation on how it addresses the protection and empowerment of vulnerable groups in particular and how it relates to the priority areas of the New Consumer Agenda. Finally, suggestions for further steps to be taken and by whom are presented, if they had been discussed in the workshops.

6.1 Policy action field 1: Product Labelling

This field of action relates to the vision that in 2030 there will be more products with a sustainability label than without. Four different ideas for actions were developed with stakeholders, one of which was discarded due to its low impact in a globalised economy, while the other three were taken up in two suggestions for policy actions.

Table 2: Vision and policy ideas for "Product Labelling"

Vision statement	**The European** market share of products that are labelled as socially and/or ecologically sustainable **will be larger than those without such a label by 2030.**
Ideas for policy options from stakeholder workshops	a) EU level certification for entire factories: any product coming from these is automatically labelled sustainable. ➢ *Not prioritised because has limited impact in globalised markets.* b) (Regulatory) benefits for certified sustainable products and factories. ➢ *Adopted in Action 1.* c) Harmonisation of producer/retailer efforts on product labelling or factory-level certifications as well as shared guidelines on implementation and best practices. ➢ *Adopted in Action 1 and 2.* d) EU wide practice for product labels for different consumer product segments addressing traceability, ethics and fairness of their value chains. ➢ *Adopted in Action 1 and 2.*

Clear, available and comparable information on social and environmental sustainability is important for consumers to make informed purchasing decisions.

As we have seen in the trend analysis in Chapter 3, sustainability of consumption has continued to grow in importance during the COVID-19 pandemic. Awareness of the impact of consumption on climate change and the actions needed is increasing among citizens in the EU and the trend towards sustainable consumption continues, for instance buying organic food from local producers or cycling instead of taking the car to work. The effects of consumption on the environment and climate change became more visible during the lockdowns, e.g. less pollution because of less traffic.

EU-wide packaging labelling is a complex policy issue that encompasses several policy instruments and activities. These include policy actions at EU level on key "sustainable/green" information requirements and a uniform definition of a "composite footprint" for enabling "green empowerment" of consumers. All relevant information for the consumer who wants to make a responsible decision for a sustainable purchase should therefore be available for each product (and service) at all times. This is even more important when the purchase decision is made online, as is currently happening more and more frequently due to the pandemic. First, the information must be recognisable in the online image or description of the product. Secondly, care must be taken to ensure that the necessary information is also easily accessible online and offline to consumers with special needs or disabilities. Finally, it has to be taken into account that on the one hand consumers want to avoid unsustainable packaging, on the other hand the majority purchases more and more online, which requires more packaging to deliver the products.

The creation of a label or colour system for sustainability, similar to the Nutri-Score for nutrition in Belgium, has been discussed for several years, as it is easier to understand and user-friendly and could inform about the sustainability of the product (environmental, social, ethical, e.g. regarding child labour, etc.). The amount of information can become very complex, especially for food, but also for some other products. Therefore, a "composite indicator" could be introduced in combination with a QR code. This could also contain information on product traceability and the entire supply chain. Combining this with digital tools to provide a code on the product itself, the warehouse shelves or the online retailer's website would match the need to reduce packaging to save material and avoid plastic. A close cooperation with the respective countries and industries would be a prerequisite to get reliable information for all categories and thus make the product more attractive for the consumer. The information on packaging must be balanced, i.e. it must be sufficient and at the same time simple and easy to understand.

As the sustainability criterion is a multi-policy issue (environmentally sustainable, regional, safe, fair, etc.), several DGs should be involved in the further development of the approach, e.g. DG ENV for environmental aspects, DG SANTE for health and safety, DG JUST for consumer protection and empowerment issues and DG DIGIT for digital solutions. In addition, cooperation with Member States is needed to implement these measures.

At the consumer level, more education and awareness raising on product labelling is needed so that the new type of information is used intuitively. Information campaigns, e.g. by consumer organisations and national and EU authorities can be helpful tools. Information packages can be made available on the websites of consumer protection organisations.

6.1.1 Challenges

To facilitate multi-level coordination for uniform agreements between the national and EU levels, it is important to coordinate all relevant institutions and contact points. Coordination is challenging because at different levels of government within the EU and its Member States, different authorities have a variety of responsibilities. The issue of coordination is also important at the EU level, as different Directorates-General need to be involved in order to coordinate the necessary actions. The following two aspects could provide guidance for the first steps:

- How to make the best use of current and future technologies while ensuring that vulnerable consumers have access to information? In particular, if purchases continue to be made predominantly online after the pandemic.

- How can green and sustainable consumption be defined and a common "minimum standard" for sustainability proposed that takes into account existing local/national initiatives?

Regarding the use of digital solutions like barcodes, the EC should examine if the use of a barcode would require a new regulation, if, and how competition problems can be avoided. Information on ethics and fairness should be included, even if the products come from countries outside the EU where different rules may apply. Emerging business models for products and services like sharing, renting or re-using should be integrated, too. They increase the sustainability of consumption and would have to be positively labelled accordingly.

An important point to consider is the coordination with already existing labels. Various producer and retailer associations, consumer protection organisations as well as regional and national authorities award their labels to products and control the standards. The established labels should be maintained and their organisations be invited to cooperate.

Another challenge will be to keep the bureaucratic burden on authorities and businesses, especially SMEs, as low as possible. They may need the support of the bodies or authorities responsible for them to comply with the new rules.

The introduction of the label is a matter of trust from all sides: Consumers, industry, politics and administration in the awarding and control of the labels. A transparent hierarchy of responsibilities and transparent procedures are needed so that it is easy to understand which criteria are required to meet which standards and who is responsible for controlling and monitoring these criteria in order to avoid undesirable results such as greenwashing.

A proposal for green empowerment is already in the works and will soon be presented by the European Commission. Another example of the successful development of an EU-wide label is the Green Passport for travel during the COVID-19 pandemic. It was approved within a few months, while other policy processes take years. Certainly, more time is needed for the implementation of the Sustainability Label, but it has to keep pace with the rapid adoption of online shopping and other online activities during the pandemic.

6.1.2 Suggested policy actions

Two suggestions for policy actions were developed for this action field. Table 3 provides a summary. A detailed description follows below.

Table 3: Suggested policy action 1 and 2

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
1	European "Agency for Sustainability" (centralised and horizontal capacity across the DGs for sustainability monitoring)	• Authority to supervise that acts horizontal (across all DGs) and more flexible; • Approves new labels, monitors the landscape, supports experimentation; • Make use of digital tools (QR-codes, blockchain etc.), for products purchased online;	2022: initialise 2023ff: set up and run it long-term 2030	Start the initiative, gather partners (other DGs, MS, stakeholders), build capacities
2	Continue to support standardisation with financing for initiatives	• Follow the paths of consumer and stakeholder participation (BEUC etc.) • Taking labels much more into account for sustainability and develop good practices (with initiatives like ANEC)	2022: Identify existing agencies and enforce them 2022: Study on legal basis	Support initiatives and connect stakeholders (EU and MS)
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, green transition, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, governance.				
Vulnerable groups: Label has to provide information easy to access for all groups of consumers, both on the product itself and at online point of sale (barrier-free and inclusive approach). Consumer organisations for certain groups should be involved in the development and design of the label and the modes to access it.				

Suggested policy action 1: European Agency for Sustainability

A European Sustainability Agency could build centralised and horizontal capacity across the EC. It would monitor the implementation of sustainability criteria across DGs and coordinate the various policy activities on the topic. This would boost EC efforts and actions in the field of product information and sustainability labelling. The Agency would approve labels and pilot projects to test new labels, e.g. using digital tools such as QR codes or distributed ledgers. It would need to monitor developments in Member States and outside Europe and serve as an alert system for emerging issues and challenges to consumer rights. Digital technologies for labelling could provide opportunities for more inclusive solutions in product information, especially when shopping online. For example, people with special needs could receive information in the form they prefer, such as through verbal descriptions of the label or colour codes. Stakeholders of vulnerable groups or people with special needs should therefore be involved in the design and development.

The European Sustainability Agency is a long-term measure and can only be realised in cooperation with other DGs. DG JUST could initiate it, start by involving the other DGs and develop the requirements for the label and the agency together with them. Internal capacity building and planning for the first steps could start in 2022, including a mapping of the DGs and organisations that should be involved in the design and implementation.

Suggested policy action 2: Continue to support standardisation with financing initiatives

The greatest possible impact of a sustainability label can only be achieved if industry is fully involved and implements or adopts the labelling. This should be supported by jointly developed standardisation. This is because standards promote acceptance by industry and trade, and thus ultimately also by consumers. They promote the spread of best practice within the industry towards more sustainable practices. In order to take more account of the consumer perspective in standardisation, the EC should provide resources with which consumer initiatives (e.g. BEUC and ANEC) can actively participate. In the stakeholder dialogues, both industry representatives and consumer protection organisations have expressed their willingness to participate in the development and implementation of the label and the agency.

The design and planning for the development of the requirements and standards can be started in 2022. For this, interested organisations and companies should first be identified and approached. It would also be necessary to clarify the legal basis for labelling and standards. Thus, capacity building and networking of key partners for development and implementation would be the first steps.

Further discussion

The establishment of an integrated labelling scheme for sustainable products and services, applicable across the EU and supported by Member States, industry and consumer protection organisations, is quite ambitious. A neutral and central agency for implementation would be very helpful to ensure that all stakeholders commit to implementing the requirements.

Discussions with stakeholders have shown that they see a great need for this action and are willing to actively shape and support it. The EC should take up this openness for implementation. Stakeholders have also stressed the need to extend sustainability criteria to the whole product life cycle.

The affordability of the labels for manufacturers and service providers must be ensured, especially for small companies. The new label should be able to reach significantly more market shares than the labels that are already successful today (e.g., Ecolabel with only 20% market share).

While labelling is a means to steer markets towards sustainability, it also needs to ensure that labelled products are affordable so that they can be purchased and used by all consumer groups.

Attempts with meta-labels have failed so far. The reasons for the failure could be that in most cases the pilot initiatives for labels did not meet the needs of an evolving and changing market. Looking ahead, QR codes are an important means to integrate different aspects into a meta-label. Furthermore, measures should start in selected product segments to avoid competition with existing labelling schemes. By integrating existing proven sustainability labels, the EC can contribute to their reliability and coherence.

The two proposals for policy actions in the area of labelling would provide consumers with crucial information about the actual sustainability of their consumption in times of crisis such as we are currently experiencing with COVID-19, namely when purchases are predominantly made online and products have to be elaborately packaged and delivered on demand. If new digital technologies are used for this, then it will simplify handling, also for groups with special needs.

6.2 Policy action field 2: Consumer Product Dataspaces

This policy action field covers activities needed to achieve the vision of accessible and comparable data with information about products and services for all consumers across Europe. The stakeholders discussed and elaborated three ideas for actions. One has been selected for the suggestion; two ideas were not considered as priority.

Table 4: Vision and policy ideas for "Consumer Product Dataspaces"

Vision statement	The EU institutions and Member States, together with other stakeholders, will **establish a Consumer Product Dataspace by 2030, with information that is comparable and accessible across Europe**.
Ideas for policy options from stakeholder workshops	a) Extended information should be made available at the point of sale, for instance by scanning a barcode or QR code. ➢ *Adopted in action 3.* b) Development of a shared, distributed, and coherent consumer product dataspace for all types of producers and consumers. ➢ *Not realistic, does not solve problem.* c) National capacity-building activities coordinated at the EU level providing ”consumer pro” online courses. ➢ *Not new, but can be enforced.*

This field of action includes the development of barrier-free and EU-wide access to all relevant product information for all consumers. It is related to the first field of action (labelling) as it aims to improve the information on the label with a solid dataspace. It is about information on products and services regarding their origin, production methods, ingredients, supply chains, environmental and social sustainability, etc., and how these become comparable with indicators. On the one hand, against the background of the massive increase in consumers' online activities since the COVID-19 pandemic, such data must be more readily available online.

On the other hand, the increase in digitisation of production, distribution and consumption generates a wide range of data that should also benefit consumers.

In order to create such a dataspace, both industry and consumer organisations would have to contribute their interests and requirements. An initiative under the auspices of the EC would be well suited for this. National facilitators could also play a key role and promote the use of the instrument in the Member States. The EC could use this dataspace to compile key product and consumer information for its communication and use it in consumer awareness and empowerment campaigns. The dataspace should be open source and available to consumer organisations for monitoring and analysis to suggest improvements.

6.2.1 Challenges

Platform providers are already using data for marketing and sales extensively, but the data is hardly used to obtain valuable information on sustainability, product quality or comparability of products for consumers. When data is available, it is usually only accessible to advanced users and not barrier-free for people with special needs. Furthermore, specific information for different consumer groups is often not available at all or only provided by specific consumer organisations and with great effort.

The following aspects should be taken into account when taking action in this area:

- Producers and consumers should be given a guarantee that data will be used, stored and updated safely.
- The data must be reliable and monitored by neutral bodies.
- There should be the necessary capacity to set up and operate the dataspace.
- Accessible use should be supported.
- It should be possible to link data across the EU.
- Information on products and services from outside the EU should also be included.
- Possible language barriers must be taken into account.

It is important to provide information for not only products that can be bought in shops, but especially for the rapidly increasing number of products and services that are bought online from the producer or on retailer platforms, as well as sold at famers' markets or pop-up stores. All information about products would need to be linked to an identifiable product code (e.g. a QR code) so that it can be used online or otherwise without obstacles. The dataspace must be well structured so that consumers can quickly find the information they need and superfluous information is sorted out for them; this means it must be very user-friendly and barrier-free as well as intuitively usable by different consumer groups.

In the light of the further suggestions for policy actions from this study, information on aspects such as warranty, reparability, availability of spare parts, qualifications required for repair or locations of repair shops should also be taken into account.

6.2.2 Suggested policy action

One policy action is suggested in the field of Consumer Product Dataspaces.

Table 5: Suggested policy action 3

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
3	Facilitate connection for decentralised system built on QR/new barcode technology	• New generation of barcodes is needed (and available) for information on the product. • Support and make use of the Digital product Passport. • Could be linked to activities of Action 1 (digital label) • Idea of a decentralised system to connect data, not to collect it.	2022: initialise partnerships. 2023ff: start pilot project(s) for technology development and testing. long-term 2030+	Facilitate connection with networking of existing initiatives, pilot study and impact assessment.
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, green transition, digital transformation, specific needs of certain consumer groups.				

Vulnerable groups: A well-structured and connected dataspace would support consumers to find the specific information they need in a barrier-free way. Furthermore, users can provide information for other consumers with similar needs.

Suggested policy action 3: Facilitate connection for decentralised system, built on QR technology

With this action, the EC can promote the establishment of a system in which decentral available data and information on products are brought together. This is essential since the surge in online activity during the COVID-19 pandemic to make the variety of data meaningful to consumers. In addition, with the trend towards sustainable consumption continuing despite the pandemic conditions, there is a greater need on the part of consumers for information on the relevant product properties.

The suggestion is not to build such dataspace, but to encourage and promote the joint activities to create such decentralised system across DGs and key stakeholders.

Innovative technologies can be used to improve the use of product information. For example, a new generation of barcodes is needed as a technical solution for the product. The support and use of a digital product passport could also be considered, which would provide information about the product even if its' lifespan is extended by reuse and repair. Such systems could use, for example, QR technology, the acceptance of which increased significantly during the COVID-19 pandemic.

Further discussion

It may not be too realistic to centralise the collection of all product information and make it available in a single EU-wide dataspace. A centralised system would not solve the problem of complex and competing information systems and diversity of user needs. However, it is still worthwhile to seek solutions to achieve this vision formulated by stakeholders; for example, by looking for good practices and initiatives that fulfil at least parts of the vision and promoting them. In addition, it is important to observe the technological possibilities of the future and to take them up at an early stage in order to create access to digital product information for the digital consumer society. The focus of the dataspace is on products and the market in Europe. However, many products are produced elsewhere, e.g. in China or other Asian countries. The challenge is to integrate all information available for all products. Necessary cooperation and partnerships with countries outside of the EU are in focus of policy action 10 (see below).

Stakeholders recommended to test this approach for selected product areas and to use experiences from best practices, e.g. the platform set up by EIT Food (www.foodunfolded.com).

6.3 Policy action field 3: Sustainability by Design

This action field covers actions to achieve the vision of the EU-wide availability of sustainable products and services for all consumers. The stakeholders discussed and developed three ideas for policy actions. Based on this, two suggestions for actions were derived.

Table 6: Vision and policy ideas for "Sustainability by Design"

Vision statement	**Sustainable products become dominant across Europe by 2030** thanks to a market shift driven by resource scarcity, consumer preferences and proactive policies.
Ideas for policy options from stakeholder workshops	a) Incentives for sustainable imports from third countries and increasing the impact beyond Europe by building on the General Scheme of Preferences (GSP), the GSP+ incentive, and the Everything but Arms (EBA) schemes. ➢ *Not new, ongoing.* b) The promotion of open-source and modular designs, spare part availability and standardisation to support reparability of products by supporting good practices and communicate about them. ➢ *Adopted in action 4 and supported by action 5.* c) Circularity (repair, reuse, recycle) by design as a new EU-wide standard and platform initiatives for sharing information and solutions, for textiles, furniture, and electronics, for instance. ➢ *Adopted in action 4.*

Despite the challenges the pandemic has posed to consumers, the trend towards sustainable consumption seems to be continuing, even if not all people can yet afford it financially or have access to the information and products needed to do so. Thus, despite the pandemic, the EC can continue to pursue its Twin Transition goal without running the risk of leaving out certain consumer groups.

Against this background, it remains important in the long term to ensure the sustainability of products in the EU, with corresponding requirements in terms of environmental, economic and social-ethical criteria.

In the workshops, stakeholders discussed different ways of linking digitalisation to the goals of the Green Deal and the desire for more sustainable goods. One way is to avoid waste by eliminating packaging, repairing broken products or refurbishing old products into something new and useful for other purposes. Consumers need to know before they buy a product whether it can be repaired and if so, what effort is required to do so. A good example is the French reparability index, which will be applied to new appliances from 2022. Another way is to use apps to provide information about the sustainability of products, e.g. in the ecological footprint. The labelling systems discussed in the previous sections could also include information about repair services and spare parts.

Many consumers who support the Green Deal may want to know where the resources of their product come from and whether they are supporting a beneficial project with their purchase. Where it makes environmental sense, subscription models for spare parts could be introduced, for example batteries for e-bikes and e-cars. Modularity by design and inspiration by open source coding could lead to more repairs, for example fair phones. More standardisation would promote modularity. A circular economy by design can be made a new EU-wide standard, both for electronics and many other products.

Even if more and more consumers are intrinsically motivated to buy sustainable products, new impulses from policy and industry need to further drive this development, especially to reduce the impact of the pandemic on sustainability, e.g. with awareness campaigns, information offers, price reductions through taxes on sustainable products, etc. The question is whether sustainable products can be made the cheapest option or whether there are alternative ways – such as convenience – to reward consumers for choosing sustainable products other than ideologically. More incentives are also needed for industry to promote reparability, durability and the circular economy. Fiscal incentives, for example, could be an option (CO_2-related taxes). Each sector could be asked to set and enforce its own repair and recycling standards within the EU.

6.3.1 Challenges

Digitalisation is being greatly accelerated by the COVID-19 outbreak and has shifted much of consumption to the internet. There are serious concerns among experts that this challenges the goals of environmental and social-ethical sustainability in particular, as energy consumption for online activities is very high and the production of electronic devices often involves (child) labour and the depletion of natural resources. Violations of human rights and environmental protection are problematic, especially when products are imported from precarious countries outside the EU. Therefore, consumer protection and empowerment is about the issue of conscious consumption, awareness of consumption consequences and accessibility of product information. It even includes the question of embedding social and ethical values in product information and how these could be promoted with minimum legal requirements.

Stakeholders have intensively discussed the reparability of products. A strong incentive to repair broken products is that it is cheaper to repair than to buy a new product. However, for many products this is not the case. Moreover, repairing a broken product requires that it can be repaired, i.e. that either the manufacturer, the retailer, the user or a professional has the necessary skills and means to repair it. In addition to consumers acquiring practical skills, a change in mind-set is also required. How can the status of products that can or will be repaired be upgraded so that it becomes less attractive to always have new things?

Another way to become more sustainable is to share or rent a product instead of owning it. In the case of mobility, renting and sharing is no longer linked to an object but to a service. More and more young people in cities are giving up the idea of owning a car. Instead, they participate in a car sharing network or rent a car. While renting is usually linked to a rent-seeking business model, sharing as part of the new voluntary platform economy can also be non-profit. Subscription systems, as introduced by the Chinese mobility company "Nio", could be an alternative to ownership: Customers only own the frame of the car, while the battery is replaced frequently and in different places, so that one does not have to charge it, but has a charged and "fresh" battery everywhere. Subscription models are already used for many products, but the goal of sustainability should be paramount.

In the context of the policy issue of accessibility of product information, information on spare parts and reparability does not necessarily have to be provided by a government agency; "Stiftung Warentest" is a successful example of the German consumer protection association. However, an EU initiative could be particularly beneficial for smaller markets and Member States that do not have such bodies. In addition, an EU-wide initiative could pool information from Member States organisations and make it available to all EU citizens free of charge. For repair, spare parts need to be available, either from manufacturers, retailers or self-produced using 3D printing. Currently, repair efforts are often hindered when they contradict manufacturers' business models. This leads not only to avoidable waste downstream, but also to unnecessary resource consumption upstream in the value chain. Planned obsolescence should be avoided and the EU has already done something about it.

To ensure that products from outside the EU meet the same sustainability standards and do not put EU products at a disadvantage, international agreements are needed. If standards are not met, the environmental and ethical impact should be reflected in the price of the product. CE legislation can serve as an example of good practice to reflect durability and reparability requirements. The issue of partnerships and cooperation with countries from outside the EU is addressed with action 10 (see below).

Within the EU, it is also important to ensure that companies comply with certain ethical standards. Corporate social responsibility is an important step in this direction, even if it is not enough from the perspective of environmental and human rights groups. They call for the introduction of further standards. For example, in the context of public procurement, member state and EU authorities could award contracts only to those companies that meet a minimum of such standards. The companies, in turn, could benefit from tax breaks and special conditions for loans.

The industry needs to develop new sustainable business models that meet the growing consumer demand for more sustainable products. The introduction of subscription models and repair services is one possibility. The questions of the future are therefore: Will companies that rely on mass consumption and disposable products be able to turn the corner and go down the path of sustainability? What steps can companies themselves take to be innovators and pioneers? How can governments support? Could the provision of seed capital create incentives for innovative companies?

To avoid monopolising platforms for sharing, renting and repairing products, open source activities can serve as proven models. This approach, combined with regulatory support, can help circumvent the concentration of market power and create new features. A task for policy makers is to find solutions on how to better promote this.

6.3.2 Suggested policy actions

Two policy actions are suggested for this field of action. The first one is a new approach to intensify consumer information on sustainability by design. The second one is a recommendation to support this with new legislation and standards.

Table 7: Suggested policy actions 4 and 5

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
4	Intensify consumer information on sustainability by design: Show options and opportunities for participation of consumers in product design and development, start dialogues and initiatives.	• Stronger need to act is seen (more and more wanted by consumers, despite the impacts of the pandemic); • More harmonised approach across the EC (DGs perspectives); • Message: "support the change and actors of change for good"; • Next level of consumer information: platform initiative plus local dialogues & workshops to connect the networks and promote good practices; • In each year, a different DG could take the lead and choose the topic, all DGs always involved.	2022: initialise project across DGs and concept development; 2023ff: run campaign and dialogues with key stakeholders from industry and consumer groups.	Initiator: Own focus on topic consumer protection and empowerment.
5	Adjust legislation where necessary and possible for sustainability by design.	• Engage stakeholders and NGOs in dialogues; • Monitoring and analysis of ongoing changes in the markets.	2022: Identify need for new legislation or hindering existing legislation for sustainable by design.	Facilitate dialogue; Initiate adjustments where needed.
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, green transition, digital transformation, internal cooperation, governance.				
Vulnerable groups: It is important to increase the share of sustainable products and services in the market and to make sure that all groups of consumers, in particular the ones with specific needs have access to sustainable products and can afford it. Greener products are often more expensive. New business models could increase access to greener products and services for all, e.g. sharing initiatives or repair and upcycling services. Furthermore, the criteria for sustainability have to cover all forms of sustainability, including social and ethical aspects. Standards are needed to guarantee that the products fulfil all criteria and that the information is available to all consumers. Finally, representatives from vulnerable groups and consumers with specific needs have to be invited to co-create the framework for sustainability by design and make sure that the activities will be inclusive.				

Suggested policy action 4: Intensify consumer information

Consumers are demanding more sustainable products and policy makers want to promote their diffusion. This requires further alignment and harmonisation of requirements and standards across the EC, taking into account the different perspectives of the different DGs involved. With joint activities, they can help to connect existing networks and promote good practices across Europe.

The organisations and initiatives in the Member States networked in this way can contribute with their platforms, local dialogues and workshops to help strengthen the active co-creation of framework conditions for sustainable consumption and consumer information on various aspects of sustainability in the long-term, thereby enabling more consumers from different groups to make sustainable purchasing decisions. It is important to involve representatives of marginalised and vulnerable groups in particular, so that their needs are also taken into account.

Suggested policy action 5: Adjust legislation where necessary and possible

Before creating new legislation, it is important to identify needs and review existing legislation that may be hindering. Especially for new business models and forms of consumption in the digital world, the role of legislation needs to be reviewed with a view to introducing more sustainable models. "Airbnb", for example, is an innovative platform whose impact depends, among other things, on how it is regulated. Currently, this is mainly done at city level and not for sustainability but rather for competitiveness reasons. The longevity of products and their reparability is insufficiently addressed in today's legislation and the interfaces with consumer protection need to be examined more closely. For example, it would be worth considering whether the 2-year warranty is still sufficient if we want to increase the longevity of products.

The EC can start activities by observing and analysing ongoing changes in the markets due to the impacts of the COVID-19 pandemic and anticipating possible future gaps in the legislation. In addition, stakeholder dialogues are crucial to ensure that all interests are taken into account and that marginalised groups are included in the dialogues.

Further discussion

Regulation needs to be based on minimum market requirements and life cycle cost analysis (LCA) in the future with changing markets in the rapid digitalisation due to the pandemic. Furthermore, to strengthen sustainability-by-design, the development of a functioning circular economy and the financing of recycling infrastructure in different sectors (e.g. textile) is important. If this were to happen only at national level, it would likely increase costs and affect competitiveness. This is why it is important that the EC calls for and promotes close coordination between Member States in this area.

6.4 Policy action field 4: Co-creation

This action field addresses the vision of embedding new framework conditions for co-creation across all sectors and across Europe by 2030. The stakeholders discussed and elaborated three policy ideas, which are adopted in the two actions suggested here.

Table 8: Visions and policy ideas for "Co-creation"

Vision statement	**Co-creation will become** embedded horizontally to different policies and management practices **across Europe by 2030**.
Ideas for policy options from stakeholder workshops	a) Co-creation integrated into managerial standards and new forms of corporate social responsibility for different sizes of companies and other actors, e.g. cooperatives and associations. ➢ *differentiate between (1) co-creation of products (open innovation), (2) produced by consumers (3D-print), (3) participatory policy making, (4) and regulation for co-creation* ➢ *adopted in action 6* b) Setting up a mutual-learning platform on co-creation among the Member States; for networking and sharing knowledge on good practices. ➢ *adopted in action 6* c) Sharing, promoting and incentivising the current EU-wide activities and efforts to implement co-creative processes in the field of consumption to enhance regulations and policies conducive to co-creation. ➢ *adopted in 6, 7*

In order to make products and services accessible to all groups of consumers, their different expectations and requirements must be taken into account already in the product development and design phase, and not only during marketing, as is still often the case. The creative power of consumers is enormous and is currently visible in the pandemic in the development of short-term local solutions, e.g. when it comes to neighbourhood assistance or clever solutions for more personal mobility despite the lockdown. The motivation of consumers to participate in product design and innovation processes increases the higher their need for solutions is. Conversely, the usefulness of products increases when they have been developed together with consumers according to their needs. In addition, digitalisation offers diverse opportunities for consumers to actively participate in innovation processes or product design, e.g. co-design via platforms and blogs.

Fostering a culture of co-creation across the EU is currently primarily a decentralised endeavour, characterised by the diversity of existing approaches and activities. In order to identify and promote promising approaches at an early stage, a first step should be to conduct a comprehensive mapping exercise. Mapping current co-design activities and efforts to implement co-design processes in the field of consumption would provide helpful information on the status and concrete needs for action in the short-term.

Furthermore, the labelling of different co-creation approaches, in particular co-design processes can facilitate a discussion between citizens and industry and contribute to an alignment of the legal framework for more participation in product design. In contrast to the historically developed system of reviews and ratings, a labelling approach is in line with the zeitgeist of digital consumption, where it is possible to see at a glance whether and how an approach meets which criteria. A good example of this is the currently discussed obligation to repair products in France, the fulfilment of which is recognisable to consumers with a label.

On the question of how consumers can help shape products, the stakeholders discussed, among other things, the possibility of setting up co-design bodies for industry. Through these co-design boards, consumers could be involved in the design processes and standards could be formulated and implemented industry-wide.

Adherence to the standards would make the products better and thus increase the competitiveness of the companies. This should not be seen as an obligation and should not override existing standards but build on them. An initiative at the sector or association level would increase the chances for small companies to benefit from consumer participation and make their products more consumer-friendly, despite having few resources. This goes as far as asking whether a family-run pottery or a small dairy producing farm would also be able to meet the standards. A framework or charter of industry organisations could build trust and make the requirements transparent for all.

A government body as a neutral authority could take responsibility for a stocktaking exercise and collect information on best practices and initiatives across Europe. The comprehensive stocktaking should involve several DGs as there are requirements for co-design in different policy areas, e.g. DG RTD, DG CNECT to provide expertise on copyright issues, DG GROW to ensure a higher level of quality and implementation of standards. In addition, DG EMPL should be involved.

Industry co-design approaches must be open to all consumers, and not focused on lead users or consumers with particular purchasing power. There are already many companies that have gained experience in this regard and should share it, e.g. with success stories that also make consumers want to participate.

To ensure the participation of different consumer groups, especially those with special needs, in industry-initiated co-design processes, consumer organisations should ensure that their interests are represented in the co-design boards. How exactly Member States governments and the EC can support these activities needs to be explored further. Several ideas have emerged in the context of the discussion of "sandboxing" recently. The term "regulatory sandboxes" refers to a temporary isolated area for experimentation where new rules and activities can be tested, not effected by the external environment. It could be a focus topic for an event with consumer organisations and industry representatives in 2022.

6.4.1 Challenges

The discussion with stakeholders has shown that quick wins in this field of action are in sight. There are ongoing European Commission initiatives to monitor innovation, digitisation and sustainability activities in EU Member States, into which co-creation approaches and processes could be integrated, such as the Community Innovation Survey (CIS), which is conducted every two years. It should be borne in mind that the availability of data for co-creation processes at SME level will be difficult. Mapping consumer participation is also a challenge. The EC relies here on the cooperation of consumer organisations to analyse the actual situation.

Case studies would be helpful to understand the motivation and business models that would make it interesting for companies to develop specific products and services for vulnerable or marginalised groups. In addition, the stakeholder dialogue discussed the establishment of more diverse consumer panels as an option; it was suggested that industry could take the lead and develop codes of conduct. Other new approaches such as cooperatives could also be alternative business models to reach and engage diverse consumer groups with specific needs.

When considering standards, the size of a company plays a role, as does the industry in which the company operates. In order not to disadvantage certain companies, it would be better not to approach the usual suspects, but to involve new actors, e.g. via cooperatives, associations.

Questions that arise in this context concern, for example, the type of innovation: can user-centred approaches only be applied at a local level or also at a supra-regional or even digital level? In order to get an overview of ongoing activities, best practices and different approaches, it would be important to investigate which actors on the industry side are already active here. It is also important to assess the framework conditions such as guidelines, standards, etc. that promote the new approaches (possibly in combination with CIS).

The design-led approach needs to be explored to facilitate usability and access for vulnerable or marginalised groups. These groups include vulnerable groups on the one hand, but also large consumer groups such as women. It is quite surprising that items that are used by such a large group on a daily basis are much better suited to male users because they are mostly designed by men and for men, e.g. cars. Design could also play a crucial role in making everyday objects more user-friendly for older people. An example of this is packaging that is more difficult for older people to open. Even users with only minor physical limitations may have difficulties opening bottles or cans. Can a concerted effort between user groups, designers, industry and policy makers create standards for universal accessibility? Could representatives of potential user groups be involved in the value chain at various points in the design, development, production and testing process? There are several overlaps with the policy issue of co-creation, as aspects of personalisation and privatisation can also be considered in co-creation as stakeholders with different perspectives work together, e.g. in Living Labs.

Before carrying out a mapping exercise, it is crucial to find out from all DGs what is happening in their respective policy areas in terms of co-creation. For example, a major challenge with 3D printed products is the consumer protection aspect: Who guarantees that the product is safe? And if something breaks, who is responsible: the seller of the design, the printer, the seller of the material?

6.4.2 Suggested policy actions

Two policy actions are suggested in the field of co-creation. One action is about the measures to increase co-design processes for industries and consumers. The other action was developed to support this development.

Table 9: Suggested policy actions 6 and 7

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
6	Support design processes that put consumer more in the centre (also with new technology)	• Institutionalise the participation of citizens and marginalised groups in early stages of problem definition and creation of solutions, e.g. with "ambassadors" and representatives in roundtables or advisory boards for developing policies, products and services. • Support digital solutions/technologies in pilot projects, like platforms for matching consumers and producers and mutual learning for industry and policymakers. • Involve industries with initiatives like a clearinghouse for consumer co-design (co-design board).	2022: initialise/ incentivise industry involvement for the creation of a co-design board (partnership), start with a specific sector.	Initiator Support the implementation of a co-design board in industry with networking and financing pilots.
7	Identify and facilitate changes in legislation to promote purpose driven products.	• Identify and facilitate adequate laws for change (e.g. warranty, guarantees, product safety, and sustainability standards in co-designed products or products created by consumers like 3D-prints). • Make sure that we do not hinder the developments with existing laws, e.g. with the implementation of a co-design "sandbox".	2022: Study: when and how do we need to adjust the legislation in the coming years?	Increase capacities and efforts to work with Member States.
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, green transition, digital transformation, specific needs for certain consumer groups, governance.				
Vulnerable groups: This action field and the suggested actions are key for a better integration of vulnerable or marginalised groups in product design and development in order to meet the variety of needs and make products accessible and usable for all. Consumption patterns are changing during the pandemic and there are future uncertainties remaining how different consumer groups will be affected long-termed. Therefore, the learning from best practices through mapping of co-creation activities and the support of the implementation in time are needed to create opportunities for industry to better meet the changing needs.				

Suggested policy action 6: Support design processes that put the consumer more in the centre (also with new technology)

The EC can provide further support for the development of processes and technologies that are more consumer-centred. This requires institutionalising the participation of citizens and marginalised groups in the early stages of problem definition and solution development. This could be promoted, for example, through "ambassadors" and representatives in round tables or advisory boards in the development of policies, products and services. Such processes could be supported by digital solutions/technologies in pilot projects, e.g. platforms that bring consumers and producers together. This would also facilitate mutual learning between industry and Member State policy makers and help to engage industry in initiatives such as a consumer co-design clearinghouse.

Suggested policy action 7: Identify and facilitate changes in legislation to promote purpose driven products

It is important to ensure that existing laws do not hinder developments towards purpose-built products; we need appropriate laws for change. For example, if services such as 3D printing are used to make a product for one's own needs with parts provided by industry, does the product get a warranty and how long is it? How are product safety standards or sustainability standards met in such a case? Such new challenges could therefore be studied in detail. The Commission could launch a study on when and how to adapt legislation in the coming years and increase capacity and efforts to cooperate with Member States.

Further discussion

When considering purpose-built products, it is worth linking them to green and digital transformation. The role of industry and industry associations could include building a clearinghouse of good practices and standards for co-creation and participation, especially for marginalised groups. Some local cooperatives and initiatives could serve as examples of good practice, e.g. local banking cooperatives, housing and energy cooperatives that use several alternative legal forms for cooperative activities.

Co-creation of products (in industry) often refers to widespread open innovation practices. It is important for consumers to integrate co-creation into the processes that lead to better products. In addition, it is also important to consider the impact of co-creation on costs and prices. The cost of creating demand for a new product through advertising is high today. If consumers become more central to production processes, the gap could narrow as more consumers buy products they really need (prosumers).

6.5 Policy Action 5: Collection and Use of Personal Data

This action field refers to the vision of increased benefit for consumers through the collection of personal data. The stakeholders discussed three ideas, but did not prioritise them. Instead, some aspects from this action field are now addressed by activities of the action field 6 (see section 6.6).

Table 10: Visions and policy ideas for "Collection and Use of Personal Data"

Vision statement	**By 2030, the collection of personal data overwhelmingly benefits the consumers and** support consumption in line with their preferences enhancing accessibility and privacy **across the EU.**
Ideas for policy options from stakeholder workshops	a) Ensuring that technology and personal data will be used for the benefit of consumers, for instance prohibiting the use of algorithms (e.g. Artificial Intelligence) for sensitive pattern recognition or for de-anonymising personal reference. b) Addressing ethical concerns with standards and guidance in systems design, for instance, to avoid biases and exploitation of psychological weaknesses in the use of machine learning, algorithms and artificial intelligence. c) Participation of representatives from vulnerable groups in user-centred, co-creative product design processes for better usability and accessibility. ➢ *for a-c: identified as a priority, but no concrete actions suggested.*

After the era of mass production, many companies took a different path and introduced customised products and services. This trend towards customisation is widespread today and goes hand in hand with the personalisation of products for the user in the course of digitalisation.

However, with increasing digitalisation and the collection of personal data about each consumer, privatisation is not always to the benefit of the end user. At the same time, we as users want products and services that meet our own personal needs. Some of these may even be unique and only apply to a single person. To keep costs in check, companies use automated collection and analysis of data about their customers. This raises many privacy issues and worries many consumer organisations and policy makers as well as developers and manufacturers.

The rapid acceleration of digitalisation during the COVID-19 pandemic has massively increased the challenges. In addition, consumers have very different abilities and opportunities to take care of their privacy when buying online.

One approach is user-centred design to ensure privacy by design. Similarly, fairness by design and product safety by design are new ways to combine the customer's demand for privacy with the provision of their personal data. These approaches need to be further explored and better publicised in industry. This has been taken up in the New Consumer Agenda.

The collection and use of data create advantages and disadvantages to the consumer. Hence, the focus should be on avoiding disadvantages, for instance, with data protection. This relates largely to the aim that we get from a situation where consumers have no control to a situation where the consumer has control of personal data. While stakeholders identified this as a priority, they did not define a clear problem or suggest actions. **Therefore, we suggest developing the idea further by linking it to the following action field 6, "Management of personal data".**

6.6 Policy action field 6: Managing of personal data and preferences by consumers

This policy field addresses vision elements of a fair management and analysis of personal data and consumer preferences. The stakeholder discussed four policy ideas and all points are integrated in the two suggestions for policy actions in this action field.

Table 11: Vision and policy ideas for "Managing of Personal Data and Preferences by Consumers"

Vision statement	**By 2030, managing personal data will become** simple and secure for all Europeans thanks to better **regulation, digital tools and higher accountability standards.**
Ideas for policy options from stakeholder workshops	a) Participation of representatives from vulnerable groups in user-centred, co-creative product design processes for better usability and accessibility. ➢ *I in the heart of all actions, here focus on "digital transformation for inclusive Europe".* ➢ *Adopted in action 9 (and several more).* b) Ensuring the citizens' ability to manage and share their personal data or provide it against remuneration in a controlled and agreed manner. ➢ *Ensuring ability with training and information.* ➢ *No remuneration! (not financial nor other type).* ➢ *Adopted in action 8.* c) Support the existing digital tools in the interest of consumers to reduce the complexity of managing personal data as well as control its use with online services, for instance. ➢ *Adopted in action 9.* d) Ensuring citizens control over their consumption data, having the possibility to choose to be identifiable or anonymous. ➢ *Adopted in action 9.* ➢ *Enhancing the rights and protection of consumers/users and prosumers, for instance in social media, sharing.*

Despite numerous efforts at policy level to reduce complexity and increase data security and usability of the internet, platforms and applications, e.g. through the EU Data Protection Regulation GDPR, the complexity of new digital technologies and solutions for users and organisations is constantly increasing. Data protection is a pillar of citizen empowerment and the EU approach to digital transformation. The demand for more power to the user is still an unfulfilled goal. Consumer organisations are concerned that information collection on purchases over the internet are influencing consumers' decisions in a manipulative way. This is even truer because of the surge in online activity during the pandemic.

The collection of user data by companies and organisations needs to become more transparent, and consumers should be able to decide more easily which data they want to share and which not. Perhaps artificial intelligence tools could be used as a solution, e.g. by monitoring data generation, sharing and use, or by generating settings that match users' preferences without having to provide cumbersome and onerous consent forms.

From the consumer's point of view, convenience and ease of use should be the focus when using the internet, rather than the additional coordination burden. One of the conveniences for consumers could be that they can more easily object to the sharing of their data.

At the same time, all users are confronted with an overabundance of information on a daily basis, which makes it difficult for them to distinguish trustworthy sources from fake news. In this context, consumers also run the risk of having no or limited choice, e.g. when algorithms make a choice on behalf of the consumer.
To give users a better chance to use the internet more efficiently and to understand the logic behind it, it is necessary to provide simple guidelines and training for all levels of users and almost all age groups. If they are developed together with the users, they can better respond to the needs of the target group. These trainings should include information on tracking, filtering algorithms, nudging, dark patterns, etc. As the internet and the use of algorithms are rapidly expanding into all areas of life, updates are recommended.

One way to protect against the invasion of consumer privacy by the internet, while taking advantage of the internet, e.g. online shopping, could be for individuals to create avatars that are not just a digital twin of their person. The data stored under the avatar could be proprietary to the consumer, who controls access to the personal data. Instead of marketers selling personal data for profit, individuals can make their own data available for consideration, as is already done with patient medical data.

6.6.1 Challenges

Avatars are already used in networked digital environments like online games. The question of whether the consumer can create, manage and own a digital twin avatar that exists end-to-end, needs to be explored further. This implies questions such as how consumers create a meaningful personalised digital twin? How can the twin be secure? The possible action points are directly related to the policy issue of personalisation and data protection.

6.6.2 Suggested policy actions

Based on the discussion with stakeholders, two policy actions are suggested.

Table 12: Suggested policy actions 8 and 9

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
8	Build capacity inside DG JUST for tackling consumer data.	• Focus on enforcement of data portability (link is there to consumer contract law). • New approach for PET should be developed. • As data protection is key: Create capacity inside the EC for defining the ECs' position on remuneration for data sharing (difficult task, see for example the discussion around sharing health data for better curation or pandemic app).	2022: Capacity building with evaluation review of existing regulation and need for improvement	Cooperation with DG CONNECT
9	Incentivise changes towards 2030, when not only companies own the data.	• Vision for 2030: not only companies own the data. • Identify risks and opportunities for consumer protection and empowerment. • Design the process towards 2030, from company owned data to data shared and used by and with consumers. • Are data cooperatives the future of data management and use for sustainable products and services?	longer-termed, not in 2022	Incentivise engagement, e.g. cities, communities, cooperatives, finance/support projects

		• Support pilot projects with use cases to test solutions in different settings, where consumers make use of the data for sustainability in an innovative way.		
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, digital transformation, redress and enforcement of consumer rights, specific needs for certain consumer groups.				
Vulnerable groups: This action field is another key area of consumer protection. The rapid shift from offline activities to online shopping, work and learning because of the pandemic lockdowns has been easy or at least manageable for many citizens. However, the long-termed effects are not fully understood yet and it is already visible that specific groups were not able to manage it successfully. Therefore, further dialogs with consumer organisations and representatives of certain consumer groups have to be carried out to better understand their challenges, detect early warning signals of risks groups, and find ways to integrate them.				

Suggested policy action 8: Capacity building inside DG JUST for tackling consumer data

Further capacity building within DG JUST could be beneficial for the handling of consumer data, as a number of other issues will arise as the pandemic continues. For example, how to deal with the General Data Protection Regulation, as it may not be the right tool for consumers to manage and own their use of personal data in post-pandemic online consumption. Enforcement of data portability could be further developed by linking it to consumer contract law. There is thus a need to assess and review the existing rules and then improve them where necessary to better support data portability and integration with other applications. In addition, a longer-term study on technological possibilities and their impact on innovative business models and services for consumer protection could be considered in this context.

Consideration of vulnerable groups is highly relevant given the yet unforeseeable impact of the pandemic on certain consumer groups with special needs. Here, the close dialogue with stakeholders must be continued in order to detect early signals of increased or new forms of vulnerability.

Suggested policy action 9: Incentivise changes

The Commission could create incentives for change towards 2030, when data will no longer belong only to companies. This would require identifying the risks and opportunities for consumer protection and strengthening consumer rights. Designing the process to 2030 would involve moving from data owned by companies to data shared and used by and with consumers. Such a process would need to clarify, for example the following questions: who should be involved? What technical solutions and requirements there are for a platform or dataspace? Which sectors or regions could pilot projects be launched? How could data sharing be made safe? Which capacities are needed for this? Are data cooperatives the future of data management and use for sustainable products and services? The pilots could be supported with use cases to test solutions in different environments where consumers use data for sustainability in innovative ways.

Further discussion

The question is how to make the collected data more accessible to consumers, as they should also benefit from the data, for example to improve products. It is therefore important to involve consumers in the development of data rules and solutions. EU leadership could lead to common rules for new forms of data sharing and business models for shared data. However, industry needs to take the lead on some issues, such as the use of data that is critical to their business models.

6.7 Policy action field 7: Agile and Resilient Consumer Policy across Government Levels

This policy field covers actions for a more agile and resilient consumer policy across all government levels for future crises.

Table 13: Visions and policy ideas for "Agile and Resilient Consumer Policy across Government Levels"

Vision statement	**By 2030, the agile and resilient consumer policy will be** coordinated effectively between the EU institutions, the Member States and regional authorities**.**
Ideas for policy options from stakeholder workshops	a) Improving crisis responsiveness. This could be supported by clarifying the roles and responsibilities at every governance level and establishing a network of contact points for crisis responses. ➢ *Adopted in action 10.* b) Enhancing risk preparedness in consumption policy with the establishment of a new register on emerging risks affecting consumer policy in Europe for prospective governance and business continuity planning. ➢ *Adopted in action 10.* c) Consumer Policy has to be scalable at global level: coordination and alignment of consumer rights and practices for sustainable, ethical and traceable production and consumption with partners from other regions of the world. ➢ *Adopted in action 10, in particular for identifying regions for cooperation.*

For the best possible support of an EU-wide redesign of consumer protection after the COVID-19 pandemic, EU-wide cooperation across all policy levels should work very well.

Production and value chains are increasingly global and interconnected. The COVID-19 pandemic shows us how difficult it is to coordinate actions of consumer protection between the different decision-making areas at EU and Member State levels and other regions. This is an issue, which cuts across the fields of action mentioned so far. It is a matter of more agile cooperation and decision-making in crises between the different DGs and other authorities at EU level, but also with and between the respective authorities at Member State and regional level and with partners from outside the EU for consumer protection in a globalised world.

The complexity of the different administrative bodies for consumer protection in the Member States is a strength of the EU in times of crisis. This was and still is the only way to respond to the different situations of the pandemic across the EU. At the same time, it is enormously difficult to coordinate the constantly changing national and even communal policies and measures and to try to create a level playing field for consumers in the EU despite the pandemic and its global impacts. Furthermore, the coordination of consumer protection authorities with the other administrative bodies from different jurisdictions such as energy, law, transport, education, etc. is of great importance for the empowerment of consumers in times of crisis at the Member States and the EU level.

6.7.1 Challenges

In many areas, the response to the pandemic would not be possible without the rapid adoption of digital options that were previously not available or slow to be adopted, such as ordering hygiene products and food online or the introduction of the digital COVID passport. With the adoption of online consumption, more risks have emerged for consumers and vulnerable groups who might be excluded from digital activities or not be protected sufficiently from online fraud. The risks are in most cases not new by nature but of new quality due to the rapid uptake of practices, which were often not considered useful before the pandemic, such as grocery shopping online.

This is not just about online practices. For example, more people have started using bicycles instead of public transport for their micro-mobility. As a result, demand for e-bikes has increased so much since the first lockdowns that the supply shortage is expected to continue for at least another year. European bike manufacturers rely on battery supplies from Asian manufacturers, which have stalled due to the global lockdowns. Others who had previously travelled by public transport and long-distance trains preferred to use private cars during the lockdowns for health reasons, leading to shortages of car-sharing provision, especially on public holidays.

In particular, the interactions between the different new consumption patterns across Europe are difficult to assess and address with current measures. The impact of consumption on the environment is being revisited and discussed differently since the pandemic. For example, a few global platform providers are dominating e-commerce and the trade of products not produced according to European safety and sustainability requirements. In addition, shipping online products increases traffic and packaging waste. The issues have not emerged with the pandemic, but the related challenges have increased with the COVID-19 outbreak.

While entire industries are threatened by the lockdowns, especially the creative industries, local specialised shops and tourism, the negotiation of future consumption practices will continue for some years after the end of the pandemic. This applies worldwide and affects consumption in Europe as much as European consumers have impact on markets outside of the EU. It is not foreseeable which interests will prevail, which offers will disappear from the market and which new offers and markets may emerge. It should be noted that the consumers who have sufficient income and the technical equipment for more online and more sustainable consumption are a strong driving force of change. However, the remaining majority of consumers in Europe has not the power to initiate new patterns of consumption and they must not be excluded from the upcoming post-pandemic reorganisation of market and consumption structures.

As a consequence, the recent experiences have to be taken into account and cooperation with partner regions outside of the EU should be considered for the support of the implementation of the New Consumer Agenda policy measures.

6.7.2 Suggested policy action

Table 14: Suggested policy action 10

No.	Suggestion for Policy Action	What is new?	When to start?	Possible role for DG JUST
10	Set up coordinated action with partner regions.	• Study on which regions in particular to look at and to cooperate with (Africa, Asia). • Involve stakeholders, MS, other regions in participatory development of possible actions (stakeholder dialogues across sectors and regions).	2022: Identify regions and sectors, invite stakeholders to dialogues about topics and needs for actions.	Initiate, connect and network.
Links to priority areas of the New Consumer Agenda: Impact of COVID-19, digital transformation, redress and enforcement of consumer rights, international cooperation, governance.				
Vulnerable groups: New risks have emerged for consumers and vulnerable groups in the EU since the pandemic. For instance, many products like hygienic articles or consumer electronics are scarce due to COVID-19 impacts on global supply chains. Furthermore, not all online platforms are barrier-free and the demand of people with special needs is not addressed sufficiently at many online shopping platforms that are often owned by international corporations. It is important that all consumer interests are considered in transforming consumption and strengthening consumer resilience. The dialogues with consumer organisations already initiated by the EC are an appropriate approach to involve different consumer groups, industry associations, representatives of people with special needs and vulnerable groups. They should be continued and extended to additional dialogues in the Member States and with partners from outside the EU.				

Suggested policy action 10: Set up coordinated action with partner regions

The dialogues already initiated by the European Commission with consumer organisations are an appropriate approach to include different interests of consumer groups, industry associations, representatives of people with special needs and vulnerable groups. The European Commission should intensively continue the dialogues and conduct some dialogues specifically on post-COVID 19 impacts in order to develop measures to empower and protect specific groups. In addition, a next step would be to find new dialogue partners outside the EU to develop new forms of cooperation for mitigating supply shortages and strengthening the resilience of EU markets for the benefit of consumers. Therefore, the EC could consider coordinated action with partner regions, for example, to explore which regions should be given special attention and to work with third countries (e.g. Africa and Asia). It would be useful to organise stakeholder dialogues that also involve Member States and other regions in developing possible actions.

Further discussion

Production and consumption are global and many products have been produced in countries outside the EU. Therefore, governance in this area should be considered from a global perspective. For the EU to become a global leader in consumer protection and enhancement, effective coordination with global partners and linkages with international frameworks, such as the WTO and OECD, are needed. Adaptive governance structures also require continuous monitoring and mitigation plans.

7 Final Conclusions

The purpose of the study was to anticipate future challenges for consumer policy in the context of the twin transition and the short- and long-termed impacts of the COVID-19 pandemic on consumer behaviour, consumption patterns and markets in Europe with a time horizon of 2025 to 2030.

Two central objectives were pursued with the study:

1. Explore the medium- and long-term impact of the COVID-19 pandemic on consumer behaviour and markets in Europe in order to identify potential needs for complementing policy measures in the New Consumer Agenda;
2. Develop important fields of action and initial ideas for possible measures together with stakeholders, with a special focus on the impact of the COVID-19 pandemic on vulnerable groups.

With its anticipatory and exploratory nature, the study was a pilot project for the implementation of comprehensive strategic foresight in DG JUST. Accordingly, the project was also used to build capacity for foresight in dealing with future uncertainty.

At the beginning of the project, an introductory workshop on strategic foresight was held, in which the individual steps of the process were explained in detail. The project team provided a glossary of important terms (see Annex 4).

In addition, representatives of several departments of the DG actively participated in the workshops in all four steps of the process and thus got to know and tested the methods of foresight. These include participatory and qualitative foresight methods such as horizon scanning and scoping for identifying key future trends, scenario and vision development for exploring different possible futures and identifying challenges, and roadmapping approaches for developing options for action.

In this way, the project was able to support the DG in actively addressing the possible futures of consumption in a post-pandemic era.

Another important element of the study was the intensive involvement of stakeholders in all steps of the process, especially in the development and discussion of future scenarios and in the development of new policy ideas.

The DG can use the various results of the Foresight process for the further future-proof implementation of the New Consumer Agenda. The **trends** examined for the scenarios can be reviewed at regular intervals with regard to new developments and impacts on consumption and consumer protection (Annex 2). The **scenarios** provide an overview of possible futures of consumption in Europe after the COVID-19 pandemic and serve for exploring the scope of possible developments (Chapter 4). The **visions** for consumer protection and empowerment, especially of vulnerable groups and consumers with special needs, summarise stakeholders' expectations for consumer policy in the next 10 years. The **action fields** prioritised together with stakeholders for consumer policy in and after the pandemic and the **ideas for policy actions** can now be used by the EC to set its own priorities and develop ideas into concrete actions. The EC may not want to take up all the ideas presented here, but the suggestions can provide guidance on which issues are of high importance from a stakeholder perspective in the COVID-19 crisis.

7.1 The trends and drivers for consumption after the pandemic

The Horizon Scanning's trend analyses have shown that European citizen's lives are impacted by the pandemic in many ways. This includes

- Fear of contagion
- Work from home and difficulties of finding a work/life balance, especially for women
- Physical restrictions and social isolation during the lockdowns
- Insecurity because of little information on protection strategies in the early months
- Increased uncertainty and risk aversion due to the severe health risks
- Financial losses and risk of unemployment and other economic risks because of the lockdowns.

One of the most important impacts of the still ongoing COVID-19 pandemic on consumer behaviour is the massive increase in online activities and shopping – from groceries to clothes, sports equipment and bicycles to streaming music and movies. Therefore, it is not surprising that most of the policy ideas proposed have to do with online activities in one way or another. Online activities present many opportunities and risks for consumers, which have already been the focus of EU consumer policy, but the dimensions of the impacts have greatly expanded because of the pandemic. Consumer protection must therefore focus even more on online shopping and other online activities in the future in order to identify and reduce the risks in the virtual world of shopping and consumption at an early stage. The risks relate to people's vulnerability, especially in terms of physical and mental health, income and social participation, as well as privacy, data protection and freedom of choice in consumption.

When thinking about longer-termed effects, it is important to distinguish temporary changes in practices and consumption from those that will endure. The study examined this for key areas of activities such as work and study, travel and mobility, entertainment, health, food and physical activities and identified several trends in relation to the COVID-19 pandemic impacts on consumption and the duration of the impacts. Those trends with yet unclear effects were used to develop the so-called key factors for the scenario development: for instance, how will the income situation change across Europe after the lockdowns and economic effects of the pandemic? Will people continue to buy local products and services, or will they buy more online without paying attention to where products come from? Will a growing consciousness of consumers to environmental impact lead to more sustainable consumption or even less consumption? How will the COVID-19 experiences effect the relation to nature? These and other questions were addressed in the scenario analysis.

7.2 Insights from scenarios for the future of consumption after the pandemic

The risks for consumers resulting from the increased online activities because of the pandemic are in tension with the trends and drivers of the two major changes in society as a whole: digitalisation and the sustainability transformation. The twin transition continues and will do so in the upcoming 10 years, despite the COVID-19 pandemic, which is affecting Europe longer than expected at the beginning. Moreover, the transition is being greatly accelerated by the pandemic as people and organisations make use of digital tools and platforms to continue their activities despite the lockdowns. The goal of making digitalisation sustainable in Europe remains important and must be pursued even more strongly in view of the acceleration of online activities. An important effect of the pandemic is that many people were clearly made aware of the connection between consumption and environmental pollution and climate change. They have experienced the effects of less traffic on air quality and wild life in public parks or the increase of packaging waste due to food delivery and online shopping. In this context, the trend analysis has shown that two emerging types of consumers related to the twin transition will continue to shape the future of consumption:

- The *responsible consumer* who limits consumption for the sake of the environment, and
- The "*tech optimist*" consumer who does not want to limit consumption despite the environmental impact and instead relies on (digital) technical solutions.

How strong their respective influence on future consumption will be cannot be determined at present. The scenarios show different variants of this and how consumption as a whole will change as a result.

Given the pandemic-related lockdowns, health risks and consequences as well as income-related consequences, **vulnerable groups are particularly affected by the pandemic** and are less likely to be able to quickly adapt their consumption patterns. It is therefore crucial to actively involve their interests and current experiences in the design and implementation of measures, e.g. through further stakeholder dialogues. This is even more important if, as many studies say, the share of vulnerable groups increases due to the crisis. For the future of vulnerable groups, the scenarios also show different development paths, to what extent it can be possible to protect consumers and how quickly the economy and society can recover from the pandemic.

It is important to note that the scenarios are not forecasts. Forecasts are heavily reliant on data, and thus are often blinded to developments for which no data exists. With the situation of the pandemic that the EU is facing currently, the limitations of forecasts or modelling have become clear. The qualitative exploration of futures with scenarios strive to account for possibilities that might not be possible to model, but can be approached through rigorous imagination. Therefore, the study used a scenario development process specifically designed to facilitate the identification of future challenges and opportunities across various scenarios and thus helps make consumer policy decisions more future-proof.

The four scenarios developed in the study outline four different development paths for consumer behaviour in the EU. None of them is a simple continuation of current developments; instead, the shock of the pandemic is taken into account. There are relevant changes compared to today, each of which is the result of the interaction of individual key influencing factors.

Scenario "United for a more sustainable, inclusive and resilient society"

This scenario is characterised by setting the securing of a fair income to support people in critical situations and fighting poverty as top priority across the EU Member States. In order to speed up the sustainable energy transition, taxes, incentives and grants are widely accepted in 2030. Diverse policies to protect private data are in place. The positive development of the markets after the pandemic is accompanied by a recovery of the labour market. Remote work is common in well-paid, knowledge-intensive jobs. After the experiences of social isolation and distancing during the lockdowns, today in 2030, social cohesion is high; being not only digitally but also socially connected is very important. Young people are drivers for the shift of values towards inclusion and empowerment. For many consumers, status symbols are sustainable products and practices.

In this scenario, the COVID-19 pandemic has strengthened social solidarity across Europe in the long-term by making many people aware of their own vulnerability and of the fact that crises can only be resolved in cooperation within society and between societies. In 2030, these ideas have led to the reduction of wide disparities in income levels across the EU, as the support for initiatives tackling inequalities in access to digital services, education/reskilling, and health care at Member State level reached soaring levels. As many activities have remained online even after the COVID-19 pandemic, the up-take of online activities in the early 2020s was a real "wake-up call" for digital consumer rights protection and sustainable consumption in the digital society. The combination of industrial investments into the digital transformation, changes in consumer behaviour and how vulnerable groups were affected by the crisis made all the difference.

Scenario "Inequalities and green growth"

In 2030, the economic inequalities are exacerbated and unemployment rates among the EU Member States are constantly high. In consequence, poverty has increased. Affordable housing is a major issue, not only in cities and metropolitan areas. Due to the bad economic situation, political tensions between European Member States are growing. For citizens, the personalised consumer experience and prices are widespread. Sustainable consumption is not of highest priority for all. A trend for responsible living and consumption is emerging, mainly driven by young people. Yet, the "technological optimists", representing the majority of consumers, are not willing to change their consumption level drastically, and tensions are growing between these two groups.

In this scenario, the pandemic has a long-term negative impact on economic and social equality in the EU. The economy in many Member States has not recovered properly even 10 years after the outbreak of the pandemic. This development has hit the economically weaker states far harder than the other states that had prosperous economies before 2020. The main reason is that the vaccination rates were too low in most Member States, even after a second and third winter with lockdowns and curfews for those not recovered or vaccinated. Some consumption patterns that occurred first during the pandemic persist. While a large proportion of consumers continued to shop almost exclusively online after the first lockdowns, there are people in marginalised social groups who have not been able to embrace this change for a variety of reasons. The openness to data sharing for health, safety, and other communal reasons since the rise of online activities to overcome the lockdowns, are transferred to data sharing across many other contexts. The pandemic affected tourism in the EU: Self-organised camping holidays are mainstream in 2030, and the number of people spending holidays in their own region is still high. The economic consequences of COVID-19, especially the global supply-chain interruptions, reduced opportunities to buy sustainable products due to income, and the negative effects of online retail on energy consumption and CO_2-emissions, have hindered the achievement of the EU's climate goals. Due to very high unemployment rates, many citizens could not afford pricier sustainable products, although available in most grocery shops, online and offline. These increased inequalities across the Member States and the different fiscal strategies to catch-up contributed to the political tensions between the countries. As a result, solidarity among citizens within the countries and among the

Member States is waning. Again, Member States are threatening to leave the EU, in particular those with an influx of populist parties due to income inequalities, effects of vaccination scepticism, declining trust in governments and xenophobia.

Scenario: Mitigated inequalities and green technology

In 2030, many EU Member States have successfully mitigated the inequality increase after the pandemic. Green growth is a successful concept in many sectors, green innovation and green-tech made in Europe are booming. Overall employment is rising, but the structural change towards a digitalised economy also causes job losses in some traditional branches and in rural areas. At the same time, many of the rural areas, which were at risk of being depopulated at the early 2020s, are now revitalised through digital infrastructures and attract young families and people who aim for a responsible and sustainable lifestyle while earning a living through remote work. "Fairness by design" and strict data protection regulations for platforms are implemented to protect consumers across the Member States. Consumption is high, yet sustainable consumption is not a priority for all.

In this scenario, the experience of the pandemic has pushed anticipatory governance in support of the twin transitions. The policy measures around and quickly after the fast uptake of the digital economy, in particular digital consumer rights for European online platforms, was a catalyst for the green transition and innovative business models to support the economic recovery in the Member States. Several laws and regulations for climate neutral technologies, products and business practices were introduced successfully across the EU economies. Yet, it takes some effort and time to negotiate the measures and regulations for climate-neutrality in all sectors between the Member States. Furthermore, several EU countries started political measures such as basic income to protect vulnerable groups during the difficult post-pandemic times. Most of these programmes led to less income inequality and higher disposable income for a large share of the population, compared to the situation in the early 2020s. A framework programme against misinformation with its national centres is successful. It has been established as a response to the populist media activities during the pandemic in order to balance media and social media posts for information and to protect citizens from misinformation.

Scenario: Inequality to the breaking point

In 2030, income inequalities in all Member States significantly increased the social division between wealthy households and those struggling on no or little income is greater than it has been for decades. Most economic systems in the EU focus on GDP-growth. Only very few countries are on their way to implement a post-growth-oriented economic system, which they have started to experiment with during or right after the COVID-19 pandemic. For the rest of the countries, post-growth ideas like frugal consumption were just a hype. Climate change causes a lot of irreversible damage, bringing the social welfare systems of national economies to its limit. Many citizens are working, learning, getting entertained and interacting with others online in augmented realities. They use digital twins of their life, provided by global platform companies. This has led to a data capitalism without any real guarantee of data protection and privacy for citizens. The level of consumption among European citizens is high and a key factor for their social identity. Most consumers believe that they can achieve the sustainability goals only with the help of innovative technologies; the tech-optimists are trendsetters in consumer behaviour.

In this scenario, the post-pandemic struggles and the increase of natural disasters have disastrous effects on the entire economic situation in Europe. Despite attempts to counter this with policies, many European citizens live in poverty. The costs for the Member States to bridge the gap between rich and poor citizens or to limit the immense inflation since the pandemic in 2030 are too high, public debts are rising and limit the financial possibilities for welfare programmes. The attempts to achieve the sustainability transformation seems to have died down in the Member States, simply because economic and social inequalities are of higher priority. The lockdowns and restrictions during the COVID-19 crisis have boosted the digital economy and online activities in all areas of private, public and work life. Online shopping, education, and work are widespread in 2030. Consumption is high and there is a strong demand for sustainable products and services, as long as they can be purchased online for those who can afford it. In 2030, people realise that the COVID-19 crisis leaves a "lost generation": The children and adolescents that experienced the restrictions and lockdowns from 2020 to 2022, in some countries due to vaccination refuse even until mid-2020, are suffering from the poor education during home schooling and of limited job and training opportunities in post-pandemic times. Many feel forced into a passive role and dependent on the help of others, and consequently have little trust in governments who fail improving their situation. The pandemic has severely shaken trust in public information and media, social disparities between people following green, social and liberal parties on the one hand and those who support extreme nationalist and populist parties on the other hand are large.

7.3 A set of visions for consumption in 2030

The further analysis of the scenarios, carried out together with experts and stakeholder in several workshops, focused on possible gaps between the four scenarios and the goals of the New Consumer Agenda. The outcome of the analysis are four visions for the future of consumption in Europe in 2030. They are formulated from the consumers' perspective and reflect different consumers' needs, including those of vulnerable groups and consumers with special needs:

- I am empowered to buy "responsibly" by accessing "responsible" data.
- I am sharing, renting & repairing.
- I can choose to live in a digital environment, where I can be in control.
- I can safely co-create and test new products, services, and business models.

The visions were the starting point for the prioritising of action fields and the development of policy ideas in stakeholder dialogues.

7.4 Suggestions for policy actions

The ten suggestions for policy actions are intended to complement the New Consumer Agenda to address the impact of COVID-19 on consumer behaviour and consumer protection, especially for vulnerable groups. They have been developed together with stakeholders from different regions of the EU and experts from different disciplines and show where there is a particular need for action from a stakeholder perspective to make consumer policy future-proof after the pandemic.

The stakeholders have identified seven action fields to achieving their visions in 2030. The suggested policy actions for each illustrate that from the stakeholders' point of view urgent action is needed in these areas to protect and empower consumers in light of the changes in consumption caused by the pandemic.

Main findings are summarised in the following sections, an overview of all suggestions for policy actions is provided at the end of the chapter.

Action field 1: Product labelling

As outlined above, the issue of sustainable consumption has continued to grow in importance during the COVID-19 pandemic. Therefore, clear, available and comparable information on social, ethical and environmental sustainability is key for consumers to make informed purchasing decisions. This applies not only to the footprints of products but also to activities such as mobility, travel and tourism or trends in nutrition. The information should be available for each product, activity or service at any time. This is even more important for consumers when the decision is made online, therefore it must be recognisable online while purchasing and should take an increase of packaging for online shopping into account.

As information on products and services can become very complex, a composite indicator should be developed for the labelling and technologies like QR-Codes should be considered for informing consumers online. The criteria for the label will include many aspects of sustainability, consequently multiple policy issues have to be combined and several DGs should be involved in the design of the label (DG ENV, DG SANTE, DG DIGIT, etc.). Campaigns for consumer education and awareness raising should accompany the introduction of a new label.

It is important to coordinate a new label with existing, well-established labels and to seek for partnerships with consumer organisations who provide relevant information or have interests in using it. This will also increase trust in the label.

The development of a sustainability label will take its time, but it should be started early enough to keep pace with the rapid adoption of online activities and the growing demand for sustainability information because of the pandemic.

As a result, two policy actions are suggested in this action field:

- **European Agency for Sustainability**
  The agency should build centralised and horizontal capacities across the EC in order to design, implement and monitor the sustainability criteria across the DGs and to coordinate the various policy activities, ongoing and new ones. It would approve labels and pilots to test new labels and criteria using digital tools. It would serve DG JUST as an alert system for emerging consumer issues.

- **Continue to support standardisation with financing initiatives**
  It is of high importance for the success and adoption of the new labels that industry is fully involved in the development of standards. The EC should provide resources with which also consumer organisations could participate. Both the industry representatives and consumer organisations have expressed their willingness to support the label and participate in the development.

Both actions could be linked to several priority areas of the New Consumer Agenda, specifically the impact of COVID-19, the green transition, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, and governance.

The interests of vulnerable groups are addressed by providing all information needed in one label, easy and barrier-free to access online, at the point of sale and on the product packaging. This would be guaranteed by involving representatives from groups with specific needs and diversity experts in the design process.

Action field 2: Consumer product dataspaces

The policy action field covers activities needed to achieve the vision of accessible and comparable data with information about products and services for all consumers across Europe. It is about the creation of barrier-free and EU-wide access to all relevant product and consumption impact information for all consumers. Related to the first field of action (labelling), it aims to improve the information for the label with a solid dataspace and includes reliable data and information on products and services regarding their origin, production methods, ingredients, supply chains, environmental and social sustainability, etc. In the light of the further suggestions for policy actions from this study, information on aspects such as warranty, reparability, availability of spare parts, qualifications required for repair or locations of repair shops should also be taken into account.

The following action is suggested in this action field:

- **Facilitate connection for decentralised system; built on QR technology**
  The EC should promote the joint establishment of a system in which decentral available data and information on products are brought together. This is essential since the surge in online activity during the COVID-19 pandemic to make the variety of data meaningful to consumers. In addition, there is a greater need on the part of consumers for information on the relevant product properties. The suggestion is not to build the dataspace but to promote its ideas and bring the interested parties together.

The focus of the suggestion is on the European markets. Of course, many goods are produced in countries outside of the EU. Therefore, the action suggested here should be linked to the policy suggestion no. 10 (see below), where international partnerships are suggested.

The policy suggestion is relevant for the priorities of the impact of COVID-19, green transition, digital transformation, and specific needs of certain consumer groups of the New Consumer Agenda.
A well-structured and connected dataspace would support consumers with special needs to find the specific information they need in a barrier-free way. Furthermore, users can provide information for other consumers with similar needs and thus empower vulnerable groups.

Action field 3: Sustainability by design

This action field covers actions to achieve the vision of the EU-wide availability of sustainable products and services for all consumers. According to the trend analysis and expectations of all stakeholder groups, it remains important in the long term to ensure the sustainability of products in the EU, with corresponding requirements in terms of environmental, economic and social-ethical criteria. Consumers need to know before they buy a product whether it can be repaired and if so, what effort is required to do so. They want to know where the resources of their product come from. It is also important to ensure that companies comply with certain ethical standards. Corporate social responsibility is an important step in this direction, even if it is not enough from the perspective of environmental and human rights groups.

Two policy actions are suggested for this action field:

- **Intensify consumer information with networks**
  The organisations and initiatives in the Member States with their platforms, local dialogues and workshops, can help to strengthen the active co-creation of framework conditions for sustainable consumption and consumer information on various aspects of sustainability in the long term, thereby enabling more consumers from different groups to make sustainable purchasing decisions. Therefore, it is suggested to support the most promising activities and actors of change from industry and also involve representatives of marginalised and vulnerable groups in particular, so that their needs are also taken into account.
- **Adjust legislation where necessary and possible**
  It is suggested to identify needs and review existing legislation that may be hindering. Especially for new business models and forms of consumption in the digital world, the role of legislation needs to be reviewed with a view to introducing more sustainable models. The EC can start activities by observing and analysing ongoing changes in the markets because of the pandemic and anticipating possible future gaps in the legislation. In addition, stakeholder dialogues are crucial to ensure that all interests are taken into account and that marginalised groups are included in the dialogues.

Both policy suggestions relate to several priorities of the New Consumer Agenda, specifically the impact of COVID-19, green transition, digital transformation, internal cooperation, and governance.

The suggestion is relevant for the empowerment of vulnerable groups as it is important to increase the share of sustainable products and services in the market and to make sure that all groups of consumers, in particular the ones with specific needs have access to these products and can afford it. New business models could increase access to greener products and services for all, e.g. sharing initiatives or repair and upcycling services. Furthermore, the criteria for sustainability have to cover all forms of sustainability, including social and ethical aspects. Standards are needed to guarantee that the products fulfil all criteria and that the information is available to all consumers. Finally, representatives from vulnerable groups and consumers with specific needs have to be invited to co-create the framework for sustainability by design and make sure that the activities will be inclusive.

Action field 4: Co-creation

This action field addresses the vision of embedding new framework conditions for co-creation across all sectors and across Europe by 2030. In order to make products and services accessible to all groups of consumers, their different expectations and requirements must be taken into account in the product development and design phase. The creative power of consumers is enormous and digitalisation offers diverse opportunities for consumers to actively participate in innovation processes or product design, e.g. co-design via platforms and blogs. A first step should be to conduct a comprehensive mapping exercise of co-design activities and efforts in the field of consumption. This would provide helpful information on the status and concrete needs for action. The stakeholders suggest the setting up of co-design bodies for industry. Through these co-design boards, consumers could be involved in the design processes and standards could be formulated and implemented industry-wide. A government body as a neutral authority could take responsibility for a stocktaking exercise and collect information on best practices and initiatives across Europe. Furthermore, the cost of creating demand for a new product through advertising is high today. If consumers become more central to production processes, the gap could narrow as more consumers buy products they really need (prosumers).

Two policy actions are suggested in the field of co-creation:

- **Support design processes that put the consumer more in the centre (also with new technology)** The EC should provide further support for the development of processes and technologies that are more consumer-centred by institutionalising the participation of citizens and marginalised groups in the early stages of problem definition and solution development. This could be promoted, for example, through "ambassadors" and representatives in round tables or advisory boards in the development of policies, products and services. This would also facilitate mutual learning between industry and Member State policy makers and help to engage industry in initiatives such as a consumer co-design clearinghouse.
- **Identify and facilitate changes in legislation to promote purpose driven products** The EC should ensure that existing laws do not hinder developments towards purpose-built products. Instead, appropriate laws for change are needed. A study is suggested as a first step.

Both suggestions would contribute to the following priorities of the New Consumer Agenda: the impact of COVID-19, green transition, digital transformation, specific needs for certain consumer groups, and governance.

Action field 4 and the suggested actions are key for a better integration of vulnerable or marginalised groups in product design and development in order to meet the variety of needs and make products accessible and usable for all. Consumption patterns are changing during the pandemic and there are future uncertainties remaining how different consumer groups will be affected long-termed. Therefore, the learning from best practices through mapping of co-creation activities and the support of the implementation in time are needed to create opportunities for industry to better meet the changing needs.

Action field 5: Collection and use of personal data

This action field refers to the vision of increased benefit for consumers through the collection of personal data. The stakeholders discussed three ideas, but did not prioritise them. Approaches like user-centred design or privacy by design have been taken up by the New Consumer Agenda. Therefore, the ideas discussed for this action field are integrated in the suggestions of the following action field "Management of personal data".

Action field 6: Managing of personal data and preferences by consumers

This policy field addresses vision elements of a fair management and analysis of personal data and consumer preferences. Despite efforts to reduce complexity and increase data security and usability of the internet, platforms and applications, e.g. through the EU Data Protection Regulation GDPR, the complexity of new digital technologies and solutions for users and organisations is constantly increasing. Consumer organisations are concerned that information collection and purchases over the internet are influencing consumers' decisions in a manipulative way. This is even truer because of the surge in online activity during the pandemic. At the same time, users are confronted with an overabundance of information on a daily basis, which makes it difficult for them to distinguish trustworthy sources from fake news. To give users a better chance to use the internet more efficiently and to understand the logic behind it, it is necessary to provide simple guidelines and training for all levels of users and almost all age groups. These trainings should include information on tracking, filtering algorithms, nudging, dark patterns, etc. As the internet and the use of algorithms are rapidly expanding into all areas of life, updates are recommended. Avatars are already used in networked digital environments like online games. The question of whether the consumer can create, manage and own a digital twin avatar that exists end-to-end needs to be explored further.

Two policy actions are suggested:

- **Capacity building inside DG JUST for tackling consumer data**
  Further capacity building within DG JUST could be beneficial for the handling of consumer data, as a number of other issues will arise as the pandemic continues. There is a need to assess and review the existing rules and then improve them where necessary to better support data portability and integration with other applications. In addition, a longer-term study on technological possibilities of avatars etc. and their impact on innovative business models and services for consumer protection could be considered in this context.
- **Incentivise changes**
  The EC should create incentives for change towards 2030, when data will no longer belong only to companies. Designing the process to 2030 would involve moving from data owned by companies to data shared and used by and with consumers. Such a process would need to clarify a broad range of questions, for example who should be involved and what technical solutions and requirements are needed. Pilots could be supported with use cases to test solutions in different environments where consumers use data for sustainability in innovative ways.

The suggestions relate to the New Consumer Agenda's priorities of the impact of COVID-19, digital transformation, redress and enforcement of consumer rights, and specific needs for certain consumer groups.

Action field 6 is a key area of consumer protection. The rapid shift from offline activities to online shopping, work and learning because of the pandemic lockdowns has been easy or at least manageable for many citizens. However, the long-termed effects are not fully understood yet and it is already visible that specific groups were not able to manage it successfully. Therefore, further dialogues with consumer organisations and representatives of certain consumer groups have to be carried out to better understand their challenges, detect early warning signals of at-risk groups, and find ways to integrate them.

Action field 7: Agile and resilient consumer policy across government levels

This policy field covers actions for the vision of a more agile and resilient consumer policy across all government levels. For the best possible support of an EU-wide redesign of consumer protection after the COVID-19 pandemic, EU-wide cooperation across all policy levels should work very well. As production and value chains are increasingly globally interconnected, there is a need for more agile cooperation and decision-making in crises across the EC, with the Member States, and with partners from outside the EU for consumer protection in a globalised world.

The stakeholders suggest the following policy action:

- **Set up coordinated action with partner regions**
  The dialogues already initiated by the European Commission with consumer organisations are an appropriate approach to include different interests of consumer groups, industry associations, representatives of people with special needs and vulnerable groups. A next step would be to find new dialogue partners outside the EU to develop new forms of cooperation for standards of product safety, sustainability and mitigating supply shortages and strengthening the resilience of EU markets for future crises.

The policy suggestion can be related to the New Consumer Agenda's priorities of impact of COVID-19, digital transformation, redress and enforcement of consumer rights, international cooperation, and governance.

Interests of vulnerable groups are addressed in several ways: new risks have emerged for consumers and vulnerable groups in the EU since the pandemic. For instance, many products like hygienic articles or consumer electronics are scarce due to COVID-19 impacts on global supply chains. Furthermore, not all international online platforms are barrier-free and the demand of people with special needs is not addressed sufficiently at many online shopping platforms that are often owned by international corporations. It is important that all consumer interests are considered in transforming consumption and strengthening consumer resilience. The dialogues with consumer organisations already initiated by the EC are an appropriate approach to involve different consumer groups, industry associations, representatives of people with special needs and vulnerable groups. They should be continued and extended to additional dialogues in the Member States and with partners from outside the EU.

Summary

The biggest challenges for consumer protection in the EU before the pandemic were the digitalisation of trade, retail and consumption with increasingly powerful international platform corporations and the necessary rethinking towards more sustainable consumption in order to achieve climate goals. The New Consumer Agenda has highlighted the interactions between the twin transitions and addresses the challenges with a series of measures. The COVID-19 outbreak has massively accelerated both transitions and respective impacts. The challenge for the EC's consumer protection and empowerment in the coming years is therefore to adapt the activities already planned to a post-COVID-19 situation and the new pace of change in a globalised economy.

For example, in some areas, the ongoing response to the pandemic would not be possible without the rapid introduction of digital options that were previously slow to be adopted, such as ordering hygiene products and food online or the introduction of the digital COVID passport. At the same time, new risks have emerged for consumers and vulnerable groups who might be excluded from digital activities or not be protected sufficiently from online fraud. Furthermore, the impact of consumption on the environment is being revisited and discussed differently since the pandemic. For example, a few global platform providers are dominating e-commerce and the trade of products not produced according to European safety and sustainability requirements; and shipping products purchased online increases traffic and packaging waste.

Moreover, the lockdowns in all regions across the world have affected supply chains. We are currently facing supply bottlenecks in many industries with longer-termed impacts on consumer markets. For instance, some electronic consumer goods like mobile phones or TV sets are scarce and books are delivered with delay because auf paper scarcity. The issues have not emerged with the pandemic, but the impacts have increased with the COVID-19 outbreak.

Consumers have been forced by the pandemic to fundamentally change their behaviour, such as working and studying from home, avoiding long-distance travel, dinners at restaurants, sporting and cultural events. It seems that some consumers want to maintain new practices permanently, e.g. working more in the home office, grocery delivery from local cooperatives or using the bicycle more often than the car or public transport for the sake of health and the environment. At the same time, many consumers yearn to catch up on many of the activities that are currently restricted, such as long-distance holiday trips or going to concerts.

While entire industries are threatened by the lockdowns, especially the creative industries, local specialised shops and tourism, the negotiation of future consumption practices will continue for some years after the end of the pandemic. It is not foreseeable which interests will prevail, which offers will disappear from the market and which new offers and markets may emerge. It should be noted that the consumers who have sufficient income and the technical equipment for more online and more sustainable consumption are a strong driving force of change. However, the remaining majority of consumers in Europe has not the power to initiate new patterns of consumption and they must not be excluded from the upcoming post-pandemic reorganisation of market and consumption structures.

All these aspects were taken into account in the study and the suggested policy actions based on stakeholder discussions and desk research relate to currently observable changes in consumer behaviour and the need for better protection and empowerment of consumers in times of the COVID-19 pandemic. A closer look at the suggested policy action fields and investigation of necessary measures to mitigate the pandemic consequences for consumers serves to strengthen the resilience of EU consumers for other crises in the future.

Most of the suggestions for policy actions are very compatible with the New Consumer Agenda. The extent to which they might actually be taken up, further specified and implemented should be examined by the EC following this study. Some of the proposed policy actions represent an expansion or concretisation of already planned activities in the priority areas of the New Consumer Agenda, for example those on product labelling or management of personal data. Others represent new options for action that may not have been needed when the New Consumer Agenda was developed, i.e. before and/or at the beginning of the pandemic.

The empowerment of the consumer and inclusion of vulnerable groups is reflected in all policy suggestions, especially in the policy issue of "co-creation". The suggested actions might not be surprising or ground-breaking, but they indicate important steps to vitalise the New Consumer Agenda for a post-pandemic time, based on insights, experiences and discussions from stakeholders and experts. All actions require a coordinated approach in the EC, as consumer affairs are hardly a clearly demarcated field. Many already existing agencies, political authorities and public as well as private organisations are involved in tackling and protecting consumers' rights. One of the biggest challenges is to find formal and informal institutions to overcome the information barriers within and between these bodies and to implement consumer empowerment and protection in the EU and all Member States to the same extent.

What are next steps?

The study was the first phase of future proofing the EU consumer policy in times of COVID-19 and it provides information on possible future scenarios, visions from a consumer perspective, stakeholder prioritised action areas and possible measures for prospective governance.

Stakeholders and experts were involved intensely in the development of the policy options. This implies that there is a certain degree of consensus across the different stakeholder groups about policy priorities related to the impacts of the COVID-19 pandemic on the future of consumption in the EU. The policy options serve as inputs to the debate and as a link to the policy instruments formulated in the Commission's plans set out in the New Consumer Agenda.

For some of the policy options, first actions can start in 2022, for others long-termed actions are suggested. Only with further enrichment through multi-stakeholder discussions and engagement, can the policy options become implications and lead to the formulation of policy instruments. Whether these policy instruments are legislatives, awareness raising activities, information platforms, initiation and support of stakeholder networks, capacity building activities, funding for research and innovation, or a combination of some of these, has to be further discussed and decided by the EC.

A main finding of this study is that despite the challenges posed to consumers by the pandemic, the trend towards sustainable consumption seems to be continuing, even though not all people can yet afford it financially or have access to the information and products they need to do so. Thus, despite the pandemic, the EC can continue to pursue its twin transition goal without running the risk of leaving out certain consumer groups.

The suggested policy actions are to be further elaborated regarding suitable policy instruments. They are all interlinked via the visions of consumption in 2030 and together form a picture for a holistic policy approach contributing to a more efficient and effective implantation of the New Consumer Agenda for a post-pandemic time.

The following table summarises the actions fields and related suggestions for policy actions:

Table 15: Overview of suggestions for policy actions

No.	Suggestion for Policy Action	What is new?	When to start	Own Role
Action Field: Product Labelling				
1	European "Agency for Sustainability": centralised and horizontal capacity across the DGs for sustainability monitoring	• Authority to supervise that acts horizontal (across all DGs) and more flexible; • Approves new labels, monitors the landscape, supports experimentation; • Make use of digital tools (QR-codes, blockchain etc.), for products purchased online.	2022: initialise 2023ff: set up and run it long-term 2030	Start the initiative; Gather partners (DGs, MS, stakeholders); Build capacities.
2	Continue to support standardisation with financing for initiatives	• Follow the paths of consumer and stakeholder participation (BEUC etc.);	2022: Identify existing agencies and enforce them.	Support initiatives and connect stakeholders (EU and MS).

<table>
<tr><td></td><td></td><td>Taking labels much more into account for sustainability and develop good practices (with initiatives like ANEC).</td><td>2022: Study on legal basis.</td><td></td></tr>
<tr><td colspan="5"><u>Links to priority areas of the New Consumer Agenda</u>: Impact of COVID-19, green transition, redress and enforcement of consumer rights, specific needs of certain consumer groups, international cooperation, governance.</td></tr>
<tr><td colspan="5"><u>Vulnerable groups:</u> The label has to provide information easy to access for all groups of consumers, both on the product itself and at online point of sale (inclusive approach). Consumer organisations for certain groups should be involved in the development and design of the label and the modes to access it.</td></tr>
<tr><td colspan="5">Action Field: Consumer Product Dataspaces</td></tr>
<tr><td>3</td><td>Facilitate connection for decentralised system, built on QR/new barcode technology.</td><td>New generation of barcodes is needed (and available) for information on the product.
Support and make use of the Digital product Passport.
Could be linked to activities of Action 1 (digital label).
Develop a decentralised system to connect data, not to collect it.</td><td>2022: initialise partnerships;

2023ff: start pilot project(s) for technology development and testing;

long-term 2030+</td><td>Facilitate connection with networking of existing initiatives, pilot study and impact assessment.</td></tr>
<tr><td colspan="5"><u>Links to priority areas of the New Consumer Agenda:</u> Impact of COVID-19, green transition, digital transformation, specific needs of certain consumer groups.</td></tr>
<tr><td colspan="5"><u>Vulnerable groups:</u> A well-structured and connected dataspace would support consumers to find the specific information they need in a barrier-free way. Furthermore, users can provide information for other consumers with similar needs.</td></tr>
<tr><td colspan="5">Action Field: Sustainability by Design</td></tr>
<tr><td>4</td><td>Intensify consumer information on sustainability by design:

Show options and opportunities for participation of consumers in product design and development;

Start dialogues and initiatives.</td><td>Stronger need to act is seen (more and more wanted by consumers, despite the impacts of the pandemic);
More harmonised approach across the EC (DG perspectives);
Message: "support the change and actors of change for good";
Next level of consumer information: platform initiative plus local dialogues & workshops to connect the networks and promote good practices;
In each year, a different DG could take the lead and choose the topic, all DGs all always involved.</td><td>2022: Initialise project across DGs and develop the concept;

2023ff: Run campaign and dialogues.</td><td>Initiator:

Own focus on topic consumer protection and empowerment.</td></tr>
<tr><td>5</td><td>Adjust legislation where necessary and possible for sustainability by design</td><td>Engage stakeholders and NGOs in dialogues;
Monitoring and analysis of ongoing changes in the markets.</td><td>2022: Identify need for new legislation or hindering existing legislation for sustainable by design.</td><td>Facilitate dialogue;

Initiate adjustments where needed.</td></tr>
<tr><td colspan="5"><u>Links to priority areas of the New Consumer Agenda:</u> Impact of COVID-19, green transition, digital transformation, internal cooperation, governance.</td></tr>
<tr><td colspan="5"><u>Vulnerable groups:</u> It is important to increase the share of sustainable products and services in the market and to make sure that all groups of consumers, in particular the ones with specific needs have access to sustainable products and can afford it. Greener products are often more expensive. New business models could increase access to greener products and services for all, e.g. sharing initiatives or repair and upcycling services. Furthermore, the criteria for sustainability have to cover all forms of sustainability, including social and ethical aspects. Standards are needed to guarantee that the products fulfil all criteria and that the information is available to all consumers. Finally, representatives from vulnerable groups and consumers with specific needs have to be invited to co-create the framework for sustainability by design and make sure that the activities will be inclusive</td></tr>
<tr><td colspan="5">Action Field: Co-Creation</td></tr>
<tr><td>6</td><td>Support design processes that put consumer more in the centre,

also with new technology.</td><td>Institutionalise the participation of citizens and marginalised groups in early stages of problem definition and solutions with "ambassadors" and representatives in roundtables or advisory boards for developing policies, products and services.
Support digital solutions in pilot projects, like platforms for matching consumers and producers and mutual learning for industry and policymakers.</td><td>2022: Initialise/ incentivise industry involvement (partnership), start with a specific sector.</td><td>Initiator

Support the implementation of a co-design board in industry with networking and financing pilots.</td></tr>
</table>

		• Involve industries with initiatives like a clearinghouse for consumer co-design (co-design board).		
7	Identify and facilitate changes in legislation to promote purpose driven products.	• Identify and facilitate adequate laws for change (e.g. warranty, guarantees, product safety, and sustainability standards in co-designed products or products created by consumers like 3D-prints). • Make sure that we do not hinder the developments with existing laws, e.g. with the implementation of a co-design "sandbox".	2022: Study (When and how do we need to adjust the legislation in the coming years?)	Increase capacities and efforts to work with MS.

Links to priority areas of the New Consumer Agenda: Impact of COVID-19, green transition, digital transformation, specific needs for certain consumer groups, governance.

Vulnerable groups: This action field and the suggested actions are key for a better integration of vulnerable or marginalised groups in product design and development in order to meet the variety of needs and make products accessible and usable for all. Consumption patterns are changing during the pandemic and there are future uncertainties remaining how different consumer groups will be affected long-termed. Therefore, the learning from best practices through mapping of co-creation activities and the support of the implementation in time are needed to create opportunities for industry to better meet the changing needs.

Action Field: Managing of personal data and preferences by consumers

8	Build Capacity inside DG JUST for tackling consumer data.	• Focus on enforcement of data portability (link is there to consumer contract law); • New approach for PET should be developed. • As data protection is key: Create capacity inside the EC for defining the ECs' position on remuneration for data sharing (difficult task, see for example the discussion around sharing health data for better curation or pandemic app).	2022: Capacity building with evaluation review of existing regulation and need for improvement.	Cooperation with DG CONNECT
9	Incentivise changes towards 2030, when not only companies own the data.	• Vision for 2030: not only companies own the data. • Identify risks and opportunities for consumer protection and empowerment. • Design the process towards 2030, from company owned data to data shared and used by and with consumers. • Are data cooperatives the future of data management and use for sustainable products and services? • Support pilot projects with use cases to test solutions in different settings, where consumers make use of the data for sustainability in an innovative way.	longer-termed, not in 2022	Incentivise engagement, e.g. with cities, communities, cooperatives. Finance and support projects.

Links to priority areas of the New Consumer Agenda: Impact of COVID-19, digital transformation, redress and enforcement of consumer rights, specific needs for certain consumer groups.

Vulnerable groups: This action field is another key area of consumer protection. The rapid shift from offline activities to online shopping, work and learning because of the pandemic lockdowns has been easy or at least manageable for many citizens. However, the long-termed effects are not fully understood yet and it is already visible that specific groups were not able to manage it successfully. Therefore, further dialogues with consumer organisations and representatives of certain consumer groups have to be carried out to better understand their challenges, detect early warning signals of risks groups, and find ways to integrate them.

Action Field: Agile and Resilient Consumer Policy

10	Set up coordinated action with partner regions.	• Study on which regions in particular to look at and to cooperate with (Africa, Asia); • Involve stakeholders, Member States, other regions in participatory development of possible actions (stakeholder dialogues across sectors and regions).	2022: Identify regions and sectors; Invite stakeholders to dialogues about topics and needs for actions.	Initiate, connect and network.

Links to priority areas of the New Consumer Agenda: Impact of COVID-19, digital transformation, redress and enforcement of consumer rights, international cooperation, governance.

Vulnerable groups: New risks have emerged for consumers and vulnerable groups in the EU since the pandemic. For instance, many products like hygienic articles or consumer electronics are scarce due to COVID-19 impacts on global supply chains. Furthermore, not all online platforms are barrier-free and the demand of people with special needs is not addressed sufficiently at many online shopping platforms that are often owned by international corporations. It is important that all consumer interests be considered in transforming consumption and strengthening consumer resilience. The dialogues with consumer organisations already initiated by the EC are an appropriate approach to involve different consumer groups, industry associations, representatives of people with special needs and vulnerable groups. They should be continued and extended to additional dialogues in the Member States and with partners from outside the EU.

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Annex 1: Possible indicators for monitoring the developments described in the different scenarios

- **Median Gross monthly earnings across EU**: In 2018, the median monthly earnings varied from EUR 4 057 per month in Denmark to EUR 442 in Bulgaria. Joining Denmark at the top of the list was Luxembourg with median earnings of EUR 3 671 per month, followed by Sweden (EUR 3 135), Belgium (EUR 3 092), Ireland (EUR 3 021), Finland (EUR 2 958) and Germany (EUR 2 891). *Eurostat (2021): "How do earnings vary across the EU?"* https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210316-2
- **Difficulties making ends across EU**: The share of households, which had difficulties making ends in 2021 ranged from the highest 74% in Croatia and the lowest 14% in Denmark. *Eurofond (2020): "Living, working and COVID-19 (Update April 2021): Mental health and trust decline across EU as pandemic enters another year"* https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef21064en.pdf
- **Gross Domestic Product (GDP) per capita across EU**: In 2019, the GDP per capita in Luxembourg has been more than 3 times higher than in Bulgaria. *Eurostat (2021): "GDP per capita, consumption per capita and price level indices"* https://ec.europa.eu/eurostat/statistics-explained/index.php?title=GDP_per_capita,_consumption_per_capita_and_price_level_indices
- **Loss of job of those who were employed before the pandemic across EU**: In Greece in Spring 2021 over 20% of those who were employed before the pandemic had lost their job, while it have been only under 5 % in the Netherlands. *Eurofond (2020): "Living, working and COVID-19 (Update April 2021): Mental health and trust decline across EU as pandemic enters another year"* https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef21064en.pdf
- **Working from home across EU**: In spring 2021, working exclusively from home was most common in Ireland (48%) and least common in Croatia (9%) and Bulgaria (10%), while the largest drop in working only from home compared to summer 2020 was recorded in Spain (from 46% to 21%) and Italy (from 48% to 26%). In several other countries, the incidence of working from home increased, notably in the Netherlands (from 22% to 37%). In 2008, less than one in twenty employees across EU reported working from home regularly. *Eurofond (2020): "Living, working and COVID-19 (Update April 2021): Mental health and trust decline across EU as pandemic enters another year"* https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef21064en.pdf
- **Trust in the EU**: In February-March 2021 the image of the EU and trust in the EU have increased and reached their highest levels in more than a decade. Almost half of Europeans (49%) stated, that they trust the European Union. *Eurobarometer (2021): "Trust in the European Union has increased since last summer"* https://ec.europa.eu/commission/presscorner/detail/en/ip_21_1867
- **Share of energy from renewable sources across EU**: In 2019, around 19% of gross final energy consumption in the EU was covered by renewable energies. *Eurostat (2021): "Share of energy from renewable sources"* https://ec.europa.eu/eurostat/databrowser/view/nrg_ind_ren/default/table?lang=en
- **Women and labour market equality**: The COVID-19 crisis has strongly affected feminised sectors such as tourism, retail, and hospitality. In 2020, 4% of women were at risk of losing such work as opposed to 1% of men. *Eurofond (2020): "Women and labour market equality: Has COVID-19 rolled back recent gains?" https://www.eurofound.europa.eu/publications/policy-brief/2020/women-and-labour-market-equality-has-covid-19-rolled-back-recent-gains*
- **Young people's mental health:** The uncertainties and broad impacts of COVID-19 have not affected all people to the same degree: young people were 30% to 80% more likely to report symptoms of depression or anxiety than adults in Belgium, France and the United States in March 2021. Young people's (15 - 24 year olds) mental health has worsened significantly in 2020 - 21. In most countries, mental health issues among this age group have doubled or more. *OECD (2021): "Policy Responses to Coronavirus (COVID-19); Supporting young people's mental health through the COVID-19 crisis"*

- **Access to high-speed internet across EU**: In 2019, rural broadband coverage continued to be lower than national coverage across EU Member States. In mid-2019, 89.7% of rural EU homes were passed by at least one fixed broadband technology and nearly two-thirds (59.3%) had access to high-speed next generation services. *European Commission (2019): "Broadband Connectivity in the Digital Economy and Society Index"*
- **Digital skills:** Although already 85% of citizens used the internet in 2019, prior to the COVID-19 crisis, only 58% possesses at least basic digital skills. Students in rural contexts and disadvantaged backgrounds were less likely to benefit from online learning, and lower skilled workers were more likely to be employed in "contact jobs", risking greater exposure to the disease whilst having lower access to healthcare. *European Commission (2020): "Digital Economy and Society Index (DESI) 2020" https://innogrowth.org/wp-content/uploads/2020/07/DESI-2020.pdf*
- **Digital adoption:** Digital adoption in Europe jumped from 81 percent to 95 percent as a result of the COVID-19 crisis—a rise that would have taken two to three years in most industries at pre-pandemic growth rates. *McKinsey (2020): "Europe's digital migration during COVID-19: Getting past the broad trends and averages" https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/europes-digital-migration-during-covid-19-getting-past-the-broad-trends-and-averages*
- **Share of e-commerce and online retail:** Lockdowns have led to a significant increase in turnover for e-commerce and online retail. In the EU-27 retail trade turnover contracted by almost 10% (March 2020) and 20% (April 2020) compared to the same periods in 2019, while retail trade via e-commerce rose by 10% in March 2020 and 40% in May 2020 to decrease by 20% in July 2020
- **Share of online platforms:** In 2020, online platforms continued to grow: the total value of the world's top 100 platforms increased by 40% to EUR 10.5 trillion. Although there are over 10,000 EU platforms in Europe, most of them are start-ups (2.7%), and only 12 are in the global top 100 with a company value higher than EUR 5.5 billion. *European Commission: "Shaping Europe's digital future" https://digital-strategy.ec.europa.eu/en/library/how-do-online-platforms-shape-our-lives-and-businesses-brochure*
- **Willingness to share private data**: In a global survey commissioned by EY and conducted by Longitude, a Financial Times company, in July and August 2020, most respondents (65%) would share medical information to improve their healthcare experience, and 54% would share demographic data with a retailer in exchange for discounts. Only 39% would share their online search history with a large technology company. *EY -Building a better working world (2020) has lockdown made consumers more open to privacy? https://assets.ey.com/content/dam/ey-sites/ey-com/en_gl/topics/consulting/ey-global-consumer-privacy-survey/ey-data-privacy-report-v2.pdf*
- **Share of people at risk of poverty or social exclusion:** In 2018, 109.2 million people, or 21.7% of the population, in the European Union (EU) were at risk of poverty or social exclusion. *Eurostat (2019): "Downward trend in the share of persons at risk of poverty or social exclusion in the EU" https://ec.europa.eu/eurostat/documents/2995521/10163468/3-16102019-CP-EN.pdf/edc3178f-ae3e-9973-f147-b839ee522578*
- **Liquidity of Small- and medium-sized enterprises (SMEs)**: SMEs are, making up 99.8% of all enterprises and two-thirds of employment (EC 2019). Approximately 40% of SMEs reported liquidity problems in 2020. In the hospitality, retail and construction sectors, 40% of SMEs had liquidity shortages in 2020. *SME united (2020): "The economic impact of COVID-19 on SMEs in Europe" https://www.smeunited.eu/admin/storage/smeunited/200630-covidsurvey-results.pdf*
- **Consumer trust in organizations:** The COVID-19 crisis changes consumer preferences in favour of companies that have supported their employees or repurposed their facilities to help slow the virus's spread. Permanent demand for brands with a strong sense of social responsibility was established, favouring the creation of an ecosystem of purpose-driven organisations. *Euromonitor International (2020): "Voice of the Industry: Sustainability Survey, fielded June 2020 - GLOBAL CONSUMER TRENDS 2021"*

Annex 2: 29 Influencing Factors on the future of consumption

The following factors were identified in the horizon scanning, based on literature analysis and an expert workshop. They were selected as highly influential in the future of consumption in post-pandemic times.

Social

Remote working and the value of space

The massive shift towards remote activities (working, studying, shopping, etc.) mean that the availability of individual space becomes a prominent concern.

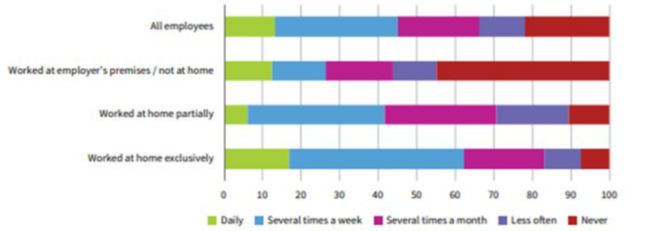
Medium-term development:

- Shift towards a remote life is unstoppable
- Necessary redesign of spaces and logistics to ensure comfort and efficiency in the medium- and long-term
- The real estate market undergoes a profound structural change, with residential space in higher demand while office spaces loses value.

Alternative:

- Confinements and lockdowns have shown that the social dimension of most of activities are essential for ensuring an acceptable quality of life
- Remote work and education are limited to the essentials and the majority of people/families are content with minor adjustments to their spaces

Figure 23: Preference regarding regularity of working from home if there were no COVID-19 restrictions, by teleworking status, EU27 (%)



In 2008, fewer than one in twenty employees reported working from home regularly. The EUROFOUND survey shows that in July, nearly half of the respondents classified as an 'employee' (48%) worked at home at least some of the time during the COVID pandemic. Of these, over a third (34%) reported working exclusively from home

Social

Purchase Priority

Safety and health as determining factors in consumer decisions

Several surveys clearly indicate that safety, security and health aspects have become the primary driving factor in consumer decisions.

Medium-term development:

- The priority given to safety and health is likely to decrease as the COVID crisis is overcome
- In the medium- and long-term, price and convenience will regain the top rank.

Alternative:

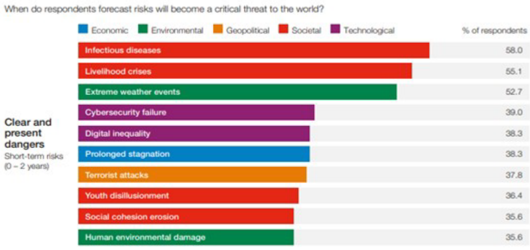
- COVID-19 pandemic has made consumers aware that safety and health must be the absolute priority.
- This induces structural changes in behavioural and purchasing patterns as consumers are willing to pay a premium for safer solutions that become part of a broader adoption of sustainability targets.

Social — Loneliness and disillusionment

Loneliness and disillusionment are growing in the EU – most apparent among vulnerable groups such as unemployed young people and the elderly – driven by multiple factors (ageing, fertility rates, work situation, family relations and bonds)

Medium-term development:

- A study of the Dutch population reveals that older people who are concerned about personal losses, the pandemic, and a decline in trust in societal institutions are associated with increasing mental health problems and loneliness (van Tilburg 2020).
- The pandemic has given rise to derogatory remarks and hate speech against older people on social media, which is a sign of growing intergenerational resentment (CoE 2021).
- The COVID-19 crisis has caused mental health issues among the younger generations – amplifying fear, loneliness and anxiety
- Since the start of the pandemic, mental health has deteriorated in 80% of children and young people worldwide (WEF 2021). Prolonged loneliness and job loss stresses could make younger generations more susceptible to alluring but divisive ideas and fuel social fragmentation (WEF 2021).



Youth disillusionment is ranked by World Economic Forum Risks report (2021) among the clear and present dangers.

Alternative:

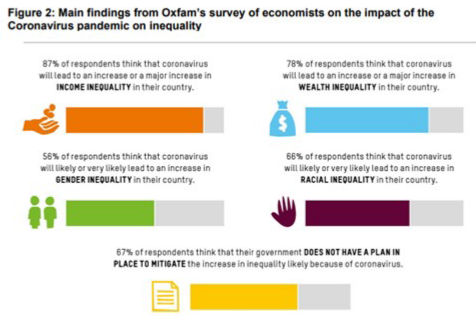
- Crisis responses and recovery measures by public administrations take different age groups into account.
- National youth strategies are devised and translated into actionable programmes. Evidence-based policies are approved with informed data on the crisis by age group. Impact assessments are conducted for the enactment of regulations and the allocation of public resources across different age groups, and institutions are given greater powers to monitor the consequences on today's youth and future generations (OECD 2020).

Social — Gender equalities

Gender equalities in terms of employment, salary, health, education, wealth, and empowerment

Medium-term development:

- The COVID-19 crisis has strongly affected feminised sectors such as tourism, retail and hospitality.
- 4% of women are at risk of losing such work as opposed to 1% of men (Eurofound, 2020).
- The majority of health and social workforce are female (75% in all OECD countries), often poorly paid. Gender-specific differences in exposure to job stress and unpaid care and household work contribute to poor physical and mental health, including depression and risk of violence.
- As of August 2020, only 18% of socio-economic measures target women's labour security or benefits for unpaid care. In terms of education, women are the most affected due to unequal access to digital learning – which is 26% lower for women than men globally.
- In 2021, Oxfam surveyed 295 economists in 79 countries. 56% of respondents thought that gender inequality would likely or very likely increase in the post-COVID-19 period.



E. Berkhout, N. Galasso, M. Lawson, P. A. Rivero Morales, Anjela Taneja, and Diego Alejo Vázquez Pimentel (Jan 2021) The Inequality Virus: Bringing together a world torn apart by coronavirus through a fair, just and sustainable economy. OXFAM Report

Alternative:

- Governments and third sector organisations take action regarding the disproportionate gender impact of COVID-19, as well as long-term policies and measures to tackle and close the gender gap.
- Increased quality data disaggregated by gender can feed into policies that help build a more equal future (Berkhout et al., Jan 2021). Among the most pressing issues at EU level is to reduce the gender pay gap by monitoring pay transparency and suggesting changes, if appropriate (EP 2020).

Technological

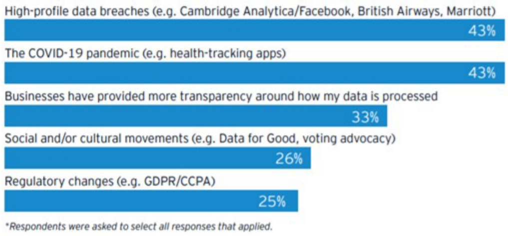
Data privacy

Consumer willingness to share data

Medium-short term development:

- The COVID-19 pandemic has rapidly changed the willingness of consumers to share data. In the medium term, this will lead to two consequences. On one hand, there will be an increased demand for transparency and control over shared data. On the other hand, there will be an increase in openness to sharing data for health, safety and other general good reasons. Most respondents (65%) would share medical information to improve their healthcare experience, and 54% would share demographic data with a retailer in exchange for discounts. But only 39% would share their online search history with a large technology company.

Figure 2: What has increased consumers' awareness of how organizations use data?



EY -Building a better working world (2020) Has lockdown made consumers more open to privacy?

Alternative:

- Data breaches by hackers and the misuse of data collected by companies and public institutions could lead to a resistance by consumers to share data and to prefer services that guarantee that no data is stored.

Technological

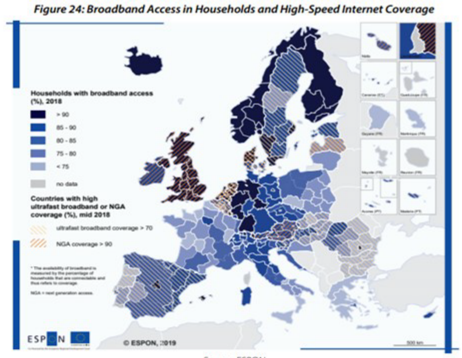
Access to digital infrastructures and digital skills

Access to broadband in households, high-speed coverage and development of digital skills

Medium-term development:

- In order to benefit from the opportunities of remote working, e-health and e-governance, access to a viable digital infrastructure and digital skills are needed. Yet, the gap in digital infrastructure between rural and urban regions was significant before and during the current crisis: 85% of urban households had access to high-speed internet (30 Mbps) compared to 56% of rural households (CoR 2020, ESPON 2018).
- Although 85% of citizens already used the internet in 2019, only 58% had at least basic digital skills before the COVID-19 crisis (EC DESI 2020). Access to digital services and remote learning/working risks becoming a privilege of urban highly-skilled people.
- Students in rural contexts and from disadvantaged backgrounds were less likely to benefit from online learning, and lower-skilled workers were more likely to be employed in "contact jobs" with an increasing risk of greater exposure to the disease whilst having lower access to healthcare (EC 2020).

Figure 24: Broadband Access in Households and High-Speed Internet Coverage



Source: ESPON

Committee of the Regions (2020) Barometer of Regions and Cities – ESPON 2018

Medium-term development:

- Access to the internet, technology and the acquisition of digital skills become a "basic human right" with vast investments being made to close the digital divide between urban and rural contexts and social groups.

Technological — Digital adoption

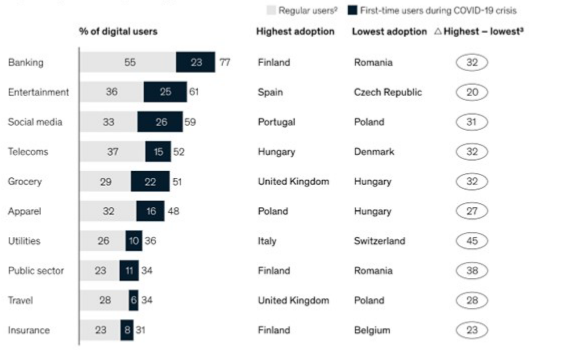
Use of digital devices to buy or look for information, advice, or recommendations

Medium-short term development:

- Continued use of digital services with the same frequency as in times of physical and business restrictions
- Although with marked differences between countries, age groups and industries. E.g. banking has the highest number of engaged users as measured by future intentions, while insurance, the public sector and grocery shopping are more vulnerable, and not only among first-time users.

Alternative:

- Poor user experiences, such as slow websites, difficult-to-use apps or lack of product availability, encourage consumers to return to shops and public offices
- In the public sector, a slow or difficult-to-use website or app was the main complaint made by nearly 80% of those who said they were dissatisfied.



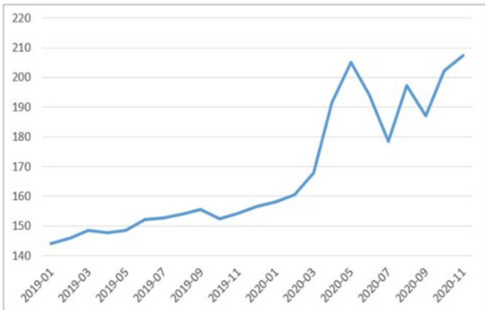
A Mckinsey survey of 20,000 European consumers between April-May 2020 shows that digital adoption in Europe jumped from 81% to 95% as a result of COVID-19 - Mckinsey (2020) Europe's digital migration during COVID-19: Getting past the broad trends and averages

Technological — E-commerce

E-commerce during the pandemic and platform strategies adjusting to the changes in demand

Medium-short term development:

- Lockdowns have led to a significant increases in turnover for e-commerce and online retail (23% between 02-11/2020). In the UK, the share of e-commerce jumped from an average of 18-20% between Q1-2018 and Q1-2020 to 32% in Q2-2020. In the EU-27, retail trade turnover contracted by almost 10% (March 2020) and 20% (April 2020) compared to the same periods in 2019, while retail trade via e-commerce rose by 10% in March 2020 and 40% in May 2020, and fell by 20% in July 2020.
- The increased use of online stores can be seen as a permanent change: people who had not previously shopped online were driven by the lockdowns and the fear of the virus to acquire new skills and familiarise themselves with this alternative form of retailing. However, during the pandemic, most consumers have switched to cheaper versions of the products they would usually buy. Price pressures continue to drive this trend after the lockdowns are lifted, particularly on discretionary products such as alcohol and premium fresh produce.



Source: Eurostat, online data code: STS_TRTU_M. Index 2015=100, seasonally adjusted monthly data.

Eurostat- retail sale via mail order houses or via internet

Alternative:

- Consumers return to physical stores after the pandemic to support local economies and buy quality products. In the agro-food sector, lockdowns shorten the distance between farmers and consumers, who now seek fresh and healthy food.

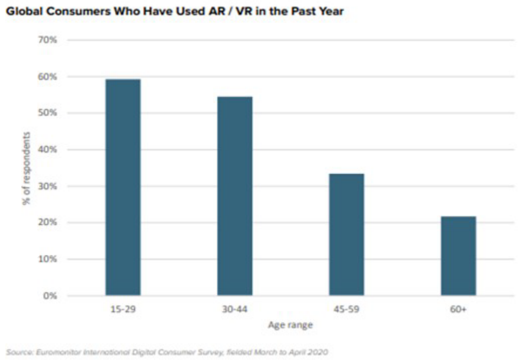
Technological

Phygital

Phygital, a portmanteau of "physical" and "digital", describes consumption practices that use physical stores and the virtual world of e-commerce and digital technology in a complementary manner.

Medium-short term development:

- Phygital experiences allow consumers to have a seamless shopping experience in-person and online. Video conferencing, smart appliances and technologies such as augmented reality (AR) and virtual reality (VR) enable Phygital Reality, which keeps consumers virtually connected despite being physically separated from the outside world.
- New, virtually driven brick-and-mortar shops will integrate virtual processes (customer identification through AI and IoT) to ensure that consumers feel safe returning to physical spaces (Euromonitor 2020). In Nespresso stores in Europe and the US, for example, customers select their coffee sleeves themselves and place them in a large container. The amount to be paid is displayed directly using connected chips or IoT (SQLI 2020).
- The World Economic Forum calls for the adoption of Phygital to hypothesise a banking evolution in the post-Covid "Isolation Economy" (WEF 2020).



Gina Westbrook, Alison Angus (2021) "Top 10 Global Consumer Trends 2021" Euromonitor International

Alternative:

- Phygital reality leads a revolution in retail, in which price-based and premium retailers will survive (Deloitte 2018). Businesses that cannot adapt to the new technologies or do not offer price-based retail will disappear after the crisis.

Technological

Tech Power

Today, seven of the eight most valuable businesses in the world are tech companies, with five based in the US and two in China, and a combined market capitalisation of 4.75 trillion dollar: Apple, Amazon, Alphabet (the holding company for Google), Microsoft, Facebook, Alibaba, and Tencent. Many tech companies have seized entirely new markets, like Amazon with e-books or Google with search engines; or they share a market with a small group of competitors (New Economic Foundation 2018).

Medium-short term development:

- In 2020, online platforms continued to grow: the total value of the world's top 100 platforms increased by 40% to 10.5 trillion euros. Although there are over 10,000 EU platforms in Europe, most of them are start-ups (2.7%), and only 12 are in the global top 100 with a company value higher than 5.5 billion euros.
- In 2020, TikTok grew exponentially, with an 80% increase in downloads in the first two quarters of 2020 (615 million). Amazon has 38% of the e-commerce market (trailed by Walmart with 6%), and between May and July 2020, consumer spending on Amazon increased by 60%. Power is therefore centralised to a few, highly influential online platforms.
- In recent years, numerous studies and investigations have suggested that some gatekeepers adopt questionable competitive practices which impact consumer choices. In April, the Wall Street Journal reported that Amazon had been using third-party data to determine which items were selling well and then making competitive own-label versions of the same products.

Alternative:

- In December 2020, the European Commission proposed the Digital Markets Act and Digital Service Act to regulate digital gatekeepers by imposing restrictions on the behaviour of tech giants. The proposed criteria will affect Google, Facebook, Amazon, Apple, Microsoft and SAP, among others (FT 2021). The new rules aim to better protect consumers, their online rights and prohibit unfair conditions. The new set of rules will also help SMEs, start-ups and smaller online platforms to scale up under fair conditions, facilitating their access to customers while reducing compliance costs.

Technological

Tech Power

Alternative 2:

- UK Competition & Markets Authority, in its final report on online platforms and digital advertising, proposes proactive measures to force platforms with significant market status to provide third-party access to data and increase interoperability (UK CMA 2020).

General practice	Platform	Nature of concern	Legal action
Unfair contract terms	Apple	Anti-steering clauses on the Apple App store (Epic games case)	Private lawsuit open (2020)
	Booking.com	Most favoured nation clauses	German NCA, overruled (2019)
	Amazon	Links between access, rankings and unrelated conditions	German and Austrian NCAs investigation open
	Google	Exclusivity clauses (Google AdSense)	Commission decision (2016 – 2019), pending ruling by the EU General Court
Anti-competitive use of third-party data	Amazon	Misuse of Amazon marketplace data to benefit own services	Commission investigation open (2019)
	Google	Misuse of third-party data to support display advertising	Italian NCA investigation open
	Apple	Concerns over Apple App store data use to inform own music product development	Dutch NCA market study (2019)
	Facebook	Misuse of third-party data	German NCA, overruled (2019), now on appeal
Self-preferencing in rankings and listings	Google	Influencing listings (Google Shopping)	Commission decision (2010 – 2017), pending ruling by the EU General Court
	Google	Pre-installation of Chrome on Android (Google Android)	Commission decision (2015 – 2018), pending ruling by the EU General Court
	Google	Refusal to list competing app on auto services	Italian NCA investigation open
	Amazon	Influencing listings for companies using Amazon fulfilment	Italian NCA investigation open
Tying and bundling	Microsoft	Tying of Media Player to the OS	Commission decision (2000 – 2004)
	Apple	Pre-installation of Apple music service onto Apple devices	Dutch NCA market study (2019)
Lack of access to key functionality	Apple	Lack of access to payment chip	Dutch NCA market study (2019)
	Amazon	Exclusive access to rating service Vine	German and Austrian NCAs investigation open
Other self-preferencing	Apple	Commissions of up to 30% on downstream competitors	Commission investigation open (2020)

Bruegel based on European Commission's DMA Impact Assessment (2020). Note: Cases investigated by the European Commission are highlighted in grey.

Technological

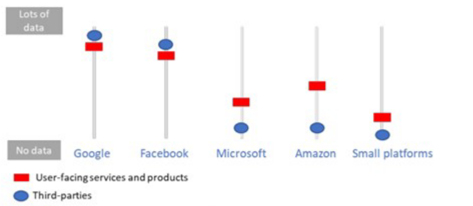
Cognitive biases on platform competition

Online platforms deploy sophisticated advertising and influence consumer purchasing via data and architecture interfaces

Medium-short term development:

- The recent CMA Report on Online Platforms and Digital Advertising provides an overview on how platforms can use choice architectures based on consumers' behavioural biases (UK CMA 2020). For example, consumer preference for default options may favour incumbent platforms, in particular those with strong brands.
- Platform operators could actively exploit psychological weaknesses, e.g. creating interfaces to make digital products addictive or increasing the time users spend on the platform by endless scrolling. The collection of consumer data on single platforms or across a digital ecosystem amplifies the power of companies to engage in microtargeting that can influence individual preferences with personalised offers or exploiting consumers weaknesses (EC 2021; Wagner & Eidenmüller 2019).

Figure 2.3: Illustration of the scale of data collection by certain platforms, split by first and third-party data sources



Source: CMA.
Note: Small platforms include Twitter, Snap, TikTok and Pinterest.

Brave (2020). Response to Consultation Regarding Online Platforms and Digital Advertising, CMA

Alternative:

- The world of online platforms is strictly regulated and consumers can opt out of sharing their data for marketing and personalised advertising in order to receive offers that are based on their current needs and rather than their past behaviour.
- The UK Competition & Markets Authority (CMA) proposes a duty of "fairness by design" for platforms with strategic market status and requires such platforms to give consumers the choice of whether or not to share their data for personalised advertising (UK CMA 2020).

Economic

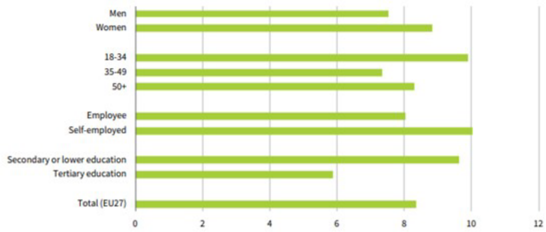
Income inequalities

Prior to COVID-19, there were wide disparities in income levels across the EU. The gaps have become even greater since the global financial crisis in 2007, driven by the relative increase in the top incomes and the relative decrease in the incomes of households at the lower end of the scale, particularly in CEE countries (WB). The top twenty percent of income earners take home 5.2 times as much as the bottom twenty percent. As a result, social polarisation has increased – not only between rich and poor, but also between cultural and ethnic groups. In 2017, 112 million EU citizens were at risk of poverty or social exclusion, corresponding to 22% of the total population.

Medium-term development:

- COVID-19 has exacerbated economic inequalities: in 2020, despite various safety nets, unemployment is projected to rise above 9% and real disposable income is expected to drop by 1%, disproportionately affecting women, low-paid workers and poorer households (EC 2020). The number of people experiencing or at risk of poverty in Europe is expected to increase by 4.8%.
- Some of those economically affected by the pandemic were also affected in terms of access to food. The Eurofound survey shows that more than a quarter of respondents have lost their job either temporarily (23%) or permanently (5%).
- Almost 40% of people in Europe report their financial situation is worse than before the pandemic – twice as many as in pre-crisis surveys. Almost half indicate that their households cannot make ends meet, and more than half report that they cannot maintain their standard of living for more than three months without an income (Eurofound 2020).

Figure 2: Respondents who became unemployed since the onset of the pandemic, by age, gender, employment status and education, EU27 (%)



EUROFOUND (2021) "Living, working and COVID – 19"

Economic

Income inequalities

Alternative short-medium term:

- It has been evaluated that the additional policies introduced by Member States during the crisis can mitigate this increase in inequality to 1.7 percentage points (EC 2020).
- The EP (2020) report "Towards a more resilient Europe post-coronavirus. An initial mapping of structural risks facing the EU" lists a number of initiatives that could lead to a reduction in inequalities during the current EP mandate (2019-2024) – namely:
  - European legal instrument for a minimum wage (Commission proposal to be discussed).
  - Monitoring the implementation of the 2013 Comprehensive Council Recommendation on Investing in Children and complementing it with a European Child Guarantee.
  - Develop an EU instrument to support an increased stock of social and affordable housing.
  - Better targeting on inequalities arising from regional disparities through effective allocation criteria for available funding.

Economic

Self confidence

The emergence of a disruptive and largely unexpected crisis might change the reliance of consumers on their individual capacity to make the right choices.

Medium-short term development:

- Trust in mainstream products and services, previously accepted precisely because of the collective consensus from which they benefit, decreases sharply, prompting consumers to question the mainstream and develop a greater capability to assess their preferences autonomously.

Alternative:

- The pandemic has shown that the complexity of this type of crisis is beyond the understanding and effective handling of individuals. Hence, it is increasingly necessary to rely on experts.

Economic

Brand Trust

Consumer choice of brand influenced by their level of trust in them and how they operate

Medium-short term development:

- There is low trust in the sectors most affected by the crisis, such as travel, tourism and leisure and entertainment, mainly due to reimbursement issues.

Alternative:

- The implementation of stimulus packages and the lifting of personal restrictions will stimulate new trust in all sectors, especially in those most affected by the crisis.

	W1	W5	W6	Change since W5
Grocery	8%	-2%	+1%	+3%
Non-grocery	3%	-5%	-2%	+3%
Banking	1%	-2%	-2%	=
Insurance	4%	1%	3%	+2%
Entertainment & Leisure	n/a	-15%	-12%	+3%
Travel & Tourism	-9%	-15%	-12%	+3%

Percentage showing net trust, i.e. trust more than before minus less than before. And to what extent do you trust each type of company now, compared with before the start of the COVID-19 situation?

Source: Consumers and the new reality, KPMG International, September 2020

KPMG International (Nov 2020) Responding to consumer trends in the new reality. KPMG sponsored a consumer pulse survey involving over 75,000 consumers across 12 markets in six separate waves over 4 months – worldwide.

Economic — Purpose-driven organisations

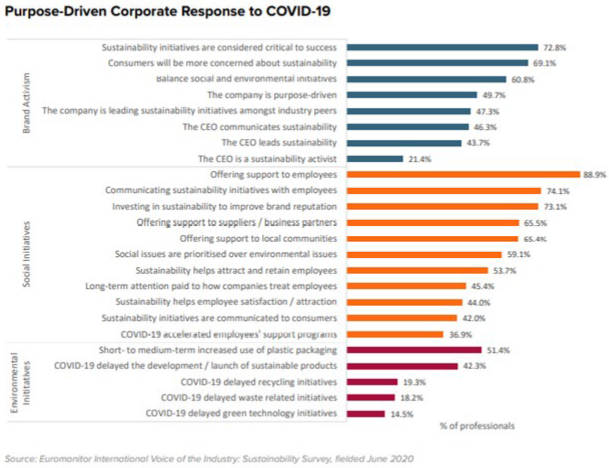
Consumer demand for brands with a strong sense of social responsibility

Medium-short term development:

- The COVID-19 crisis changes consumer preferences in favour of companies that have supported their employees or remodelled their facilities to help slow the virus' spread.
- The demand for brands with a strong sense of social responsibility is constant, favouring the creation of an ecosystem of purpose-driven organisations. For example, in August 2020, 14 senior executives from Danone, Philips, L'Oréal and Mastercard, among others, formed a non-profit organisation called Leaders on Purpose, proposing an economic roadmap for Build Back Better.

Alternative:

- Consumers lose interest in companies' social responsibilities when social restrictions end and the vulnerability to health is forgotten.



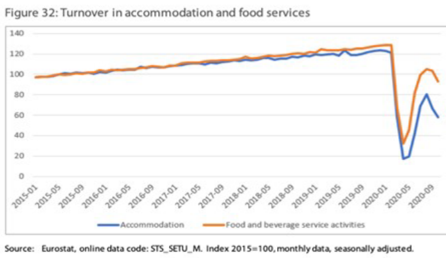
Source: Euromonitor International Voice of the Industry: Sustainability Survey, fielded June 2020 - GLOBAL CONSUMER TRENDS 2021

Economic — Supply chain

Ensuring availability and accessibility of products – especially critical ones – for consumers during and after the pandemic.

Medium-short term development:

- The COVID-19 crisis impacted the global supply chain and highlighted the inability of nations to ensure the provision of critical goods in times of crisis.
- Among the most critical issues, EU countries experienced shortages of personal protective equipment, medical devices and testing supplies.
- 40% of medicinal items and products marketed in the EU originate from third countries and 80% of active pharmaceutical ingredients are produced in China and India (EP 2021). Shortages and oversupplies were also registered due to changes in consumption patterns (for instance, increased purchase of storable consumption goods).
- After this initial disruption, industrial production recovered by 80% in the second quarter of 2020, without major disruption and changes to supply chains. The EU's "green lanes" have ensured an unimpeded flow of goods within the Internal Market (EP 2021).



EUROSTAT – turnover in accommodation and food services

Alternative:

- COVID-19 exposed the vulnerabilities of European economies, which rely heavily on imported goods and materials coming from third countries.
- In the near future, there will be a political consensus for deep reorganisation of the supply chain, supporting EU/national production and reserve capacities in order to create resilient global supply chains. In most cases, this demand is a call to bring production back to industrialised countries from emerging economies (EY 2020).

Economic — Small and medium enterprises

Small- and medium-sized enterprises (SMEs) are the backbone of the European economy, making up 99.8% of all enterprises and two-thirds of employment (EC 2019).

Medium-short term development:

- SMEs, due to their size, are less resilient than larger businesses and most affected by the COVID-19 pandemic. The EU United survey reveals that approximately 40% of SMEs face liquidity problems in 2020. In the hospitality, retail and construction sectors, 40% of SMEs have liquidity shortages (SME United 2020).
- In the first half of 2020, a steep rise in demand for credit is registered in Europe (EIB2020). Online platforms have opened up new sales and sourcing channels for SMEs, but their uptake remains limited and lags behind larger firms. While big retailers and brands flourish in digital sales, thousands of small businesses struggle to survive.
- A growing number of smaller players are exploiting niche markets by developing short supply chains, creating producer-to-consumer models and investing in knowledge. SMEs are surviving thanks to a shift from liquidity measures, which remain a priority, to recovery investments that favour a digital and sustainable transition, such as training in new technologies, internationalisation, access to management professionalisation, etc.

Alternative:

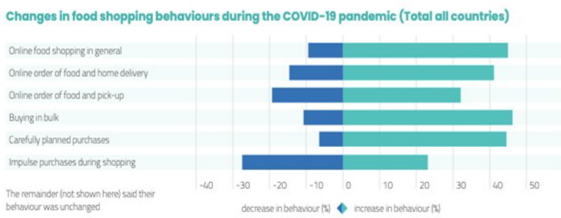
- The majority of SMEs do not survive the pressure caused by the pandemic. The risk of insolvency in the short and medium term, in particular in the tourism and hospitality fields, heavily affects SMEs that do not receive adequate support to access credit and favourable repayment conditions in the long term.
- The crisis accelerates the closure of SMEs, particularly in Eastern and Central Europe, established in the early 1990s, their founders retiring without handing over the business to younger generations.

Economic — Local products and distribution

Consumer interest in local groceries and the evolution of the supply chain in the agro-food sector.

Medium-short term development:

- During the pandemic, food becomes central to consumers' lives and citizens become more aware of what they buy – such as local provenance, freshness, and packaging. Forced to reduce the use of "ready meals", consumers open themselves up to alternatives, enjoying cooking at home and experimenting with new recipes. More meals are cooked from scratch more often than in the pre-pandemic period. However, differences between the generations can be seen: Generation Z and Millennial consumers – approx. +35%, Generation X +23% and baby boomers +17% (McKinsey&Co. 2020).



- Consumers are shifting to online grocery shopping – which has increased by 45% overall (EIT Food. 2020). The demand for online groceries doubled in Italy in April 2020, and in the same period, online supermarket Ocado Retail reported a tenfold increase in demand and 100 times more web traffic than before the pandemic.
- Local initiatives aiming at developing Direct-To-Consumer (DTC) have flourished. Beneficial for local economy, these initiatives still need to consolidate business models that are suitable for modern lifestyles and more friendly to farmers and the environment (e.g. creation of neighbourhood pick-up points, increased investment in transport infrastructure, etc.).

Medium-short term development:

- Economic contraction reduces disposable income and drives consumers towards a more conservative approach by avoiding expenditure on premium, healthy and local food.
- The digitalisation of the supply chain is a temporary change for small businesses. In most countries, grocers do not have the infrastructure and knowledge to serve such a surge of online consumers. Direct-To-Consumer (DTC) models remain a niche market for those who can afford it (time and money).

Environmental

Energy transition

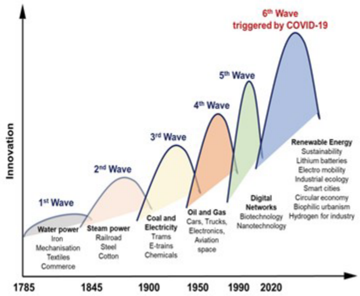
Improvement in energy efficiency and production, distribution and use of renewable energies

Medium-short term development:.

- The short-term effects of the crisis on the reduction of energy demand and the lowering of carbon dioxide emissions will disappear unless major supply-side policies and strategies are enacted.
- As Dr Fatih Birol – Executive Director of the International Energy Agency – recently said: "The crisis has brought lower emissions but for all the wrong reasons. If we are to achieve a lasting reduction in emissions, then we will need to see a rapid increase in clean energy investment. The response of policy makers – and the extent to which energy and sustainability concerns are integrated into their recovery strategies – will be critical."

Alternative:

- A move towards the use of sustainable and renewable energies is being accomplished thanks to multiple COVID-induced developments based on "smart-city technology". Clean energy production, distribution and use is improved across all fields through the use of smart sensors, machine learning, artificial intelligence (AI), blockchain and the Internet of Things (IoT).
- However, the question remains to what extent these new options are more efficient and able to provoke a real paradigm shift. In 2015, ICT networks consumed 1.15% of the total electricity grid supply worldwide and contributed to 0.53% of global carbon emissions related to energy.
- With new devices and use cases that could increase the capacity of networks, it becomes critical to ensure low energy consumption of 5G in order to meet energy reduction goals. Otherwise, it is likely that the share and related emissions would increase fiftyfold and play a major role in energy consumption.



Waves of innovation through industrial history and into the future, adapted from Newman (2020)

Environmental

Awareness - Relation to nature

Citizens' perception of nature and interest in natural and healthier products

Medium-short term development:

- The current pandemic reminds us that our health is intrinsically linked to the health of our natural environment, especially forests, which represent a unique biodiversity hub hosting over 80% of all terrestrial species of animals, plants and insects. The pandemic is a stark reminder that planetary health and human health are interconnected and that economies can only thrive on a healthy planet.
- Following the COVID-19 crisis, citizens continue to look for outdoor and nature activities for leisure and recreation – with an increased awareness of the importance of access to local blue and green spaces. Some move from cities to small town centres and rural areas, whereas city dwellers use urban green areas for exercising, socialising and relaxing, with positive effects on their mental and physical well-being. Neighbourhoods with green areas are in demand. Businesses recreate their indoor offerings by building temporary structures outdoors.
- Gardening and urban farming are common practices across generations. The increased feeling of connection with nature induces citizen in engaging in the protection of natural areas and in incorporating sustainability criteria into their consumption behaviour. Getting closer to nature is primarily interpreted as an increase in the consumption of "natural" and healthier products (with fewer or no chemical components) for food (e.g. plant-based diets), personal care and the rise of traditional medicine.

Alternative:

- Increased access to green and blue spaces does not create greater awareness or a change in consumer preferences.

Environmental

Private vehicle use

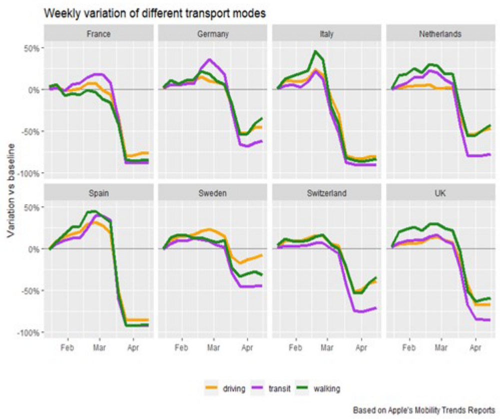
To minimise contact with others, many people are choosing to travel in their own vehicles. The use of public transportation and carpooling has declined significantly worldwide. The effects of the overall underlying disenchantment with car ownership and use, especially among young people, are now at least partially offset by the urge to avoid crowded public transport solutions.

Medium-short term development:

- Mobility choices remain largely affected by the effects of the pandemic, and many citizens prefer to travel in their own vehicles. However, a massive reduction in face-to-face meetings in favour of virtual/digital solutions will reduce the traffic volumes (passenger/ kilometres) and contribute decisively to decreasing private vehicle traffic, although freight transport might increase.

Alternative:

- Decisive innovations in public transport business models regenerates trust in collective mobility solutions, and many citizens combine public transport use with soft transport modes (walking and cycling, including electric micro-mobility). In the longer term, as sustainability concerns increase and diffuse, an increasing share of the population will give up private vehicles and switch to active modes of transport.



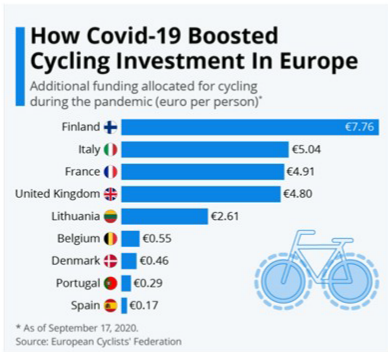
Environmental

Cycling modal share

Share of cycling in cities' modal share – use of bicycles for daily trips as a means of transport in an urban context

Medium-short term development:

- In the coming future, cycling modal share is expected to increase by 5%. The [Pedestrian and Bicycle Information Centre] has tracked thousands of immediate community actions to cope with mobility needs and social distancing. Many temporary cycling measures and transition actions are become permanent. Milan has transformed 35km of streets, previously used by cars, into cycling lanes. Paris has developed 50km of lanes for bicycles. Brussels has continued transforming 40km of car lanes into bike paths. Barcelona has created six car-free superblocks (Benoit et al., Sept 2020).
- During COVID-19, many people prefer cycling as a means of coping with mobility needs, social distancing and health concerns. To promote this shift, 34 out of the EU's 94 largest cities have implemented conventional cycling lanes, car-free areas and traffic calming measures (McCarthy, Oct 2020). These temporary solutions are expected to become permanent solutions, leading to a modest increase in cycling mode share.



Alternative:

- The COVID-19 pandemic forces towns to invest heavily in cycling infrastructure in order to avoid overcrowded public transportation systems. More and more people use bicycles, driving business for bicycle manufacturers, who have sometimes had difficulty in meeting demand. Governments invest in rolling out infrastructure to maintain the cycling boom. Since the outbreak of COVID-19, more than €1 billion has been spent on implementing cycling infrastructure and more than 1000 kilometres of cycling lanes across Europe. The following figures, based on data from the European Cyclists' Federation provides an overview of cycling investment per person by country: Finland €7.76 - Italy € 5.04 - France € 4.91 – UK € 4.80 – Lithuania € 2.61 – Belgium € 0.55 (McCarthy, Oct 2020).

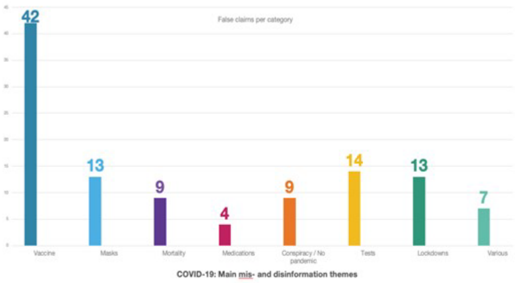
Political

Fake news and infodemic

An over-abundance of information – some accurate and some not – that makes it hard for people to find trustworthy sources and reliable guidance when they need it (WHO 2020)

Medium-short term development:

- Persistent spreading of conspiracy theories, hoaxes and frauds inducing consumers to believe and buy dangerous products, especially in the health sector. Uncontrolled spread of global hoaxes and scams that aimed to trick people into buying fake or non-existent products (consumer fraud), or stealing user data (cybercrime).
- The ESMH publishes monthly reports that provide an overview of the online spread of deceptive narratives related to the COVID-19 crisis. In January 2021, the vast majority of the 100 false claims and misinformation analysed referred to the COVID-19 vaccine (42), followed by the use of masks (13) and lockdown measures (13) (ESMH, 2021)



European Science-Media Hub; Trending mis- and dis-information topics around COVID-19 on social media – January 2021

Alternative:

- Implementing an effective EU framework to fight misinformation (combination of measures such as enhancing the work of EUvsDisinfo, use of the rapid alert system, increased support for fact-checkers and researchers, the creation of a new European Digital Media Observatory, strict adoption of EU Code of Practice (EPRS 2020).

Political

Trust in the EU and national institutions

The level of trust in institutions plays a key role in the COVID-19 pandemic, as governments adopt restrictive measures to balance health protection with economic stability.

Medium-short term development:

- In times of a pandemic, the level of trust in European, national, local institutions is of utmost importance. EU institutions gained additional trust thanks to the €540 billion emergency rescue package, the relaxation of EU state aid rules and the application of more flexible EU fiscal rules and structural funds. At national level, over 600 measures are implemented by Member States, mainly focused on helping businesses to stay afloat (40%) and protecting the incomes of workers (20%) (Eurofound's COVID-19 database).
- These initiatives raised the level of trust in EU and national governments, especially among citizens who received financial support during the pandemic. In the near future, the coordinated efforts of the Member States and Europe to address the pandemic will consolidate cohesion among EU countries, strengthen the legitimacy of the EU and increase citizens' trust.

Medium-short term development:

- The COVID-19 pandemic fosters inequalities between socio-economic groups and among Member States, with significant psychological effects that increase feelings of insecurity and uncertainty. Persistent divergences in performances between Member States and a lack of multilateral and bilateral European solidarity undermine political support for maintaining and deepening economic and political integration in the EU.
- Populist and anti-EU movements grow at a time when trust in the EU project is already being challenged by the health and economic crises. It leads to further erosion of the EU and, after Brexit, to the exit of other countries from the Union (Grexit etc.).

Table 4: Trust in institutions (mean scores), EU27 (scale 1 to 10)

Survey round	Media	Police	Government	EU	Healthcare system
1. April 2020	4.6	6.2	4.8	4.6	6.4
2. July 2020	4.5	6.2	4.6	5.1	6.5

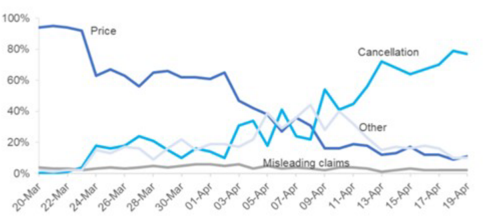
Note: *The survey question was: 'Please answer on a scale of 1-10 how much you personally trust each of the following institutions'. 1 - Do not trust at all; 10 - Trust completely.*

Eurofound (2020), Living, working and COVID-19, COVID-19 series, Publications Office of the European Union, Luxembourg.

Political — Cancellations and price gouging

Right to a refund in case of cancellation of service by the operator. Price gouging is the practice of increasing prices to an unfair/exploitative level.

Complaints by type



CMA (2020)Protecting consumers during the coronavirus (COVID-19) pandemic: update on the work of the CMA's Taskforce.

Medium-short term development:

- The COVID-19 pandemic leads some companies to circumvent consumer rights. The scale of the pandemic has multiplied the numbers of consumers affected by these practices, which hit all sectors simultaneously. The UK's Competition and Markets Authority received almost 21,000 complaints about coronavirus-related issues between 10 March-19 April 2020. Of these, cancellation complaints accounted to 4 out of 5 complaints received and were concentrated across a small number of large firms.
- The CMA investigates complaints of unjustified price rises and takes action to prevent them, including by writing to 187 traders against whom a total of more than 2,500 complaints have been made (CMA 2020). In the near future, mechanisms to avoid unfair practices are implemented by Member States with different results and at different times – some with more success than others.

Alternative:

- The scale and alert provoked by COVID-19 at EU and national level leads to a review of EU consumer law and enforcement mechanisms in order to ensure "fairness by design“ for consumers – rather than as a remedy (C. Riefa 2020).

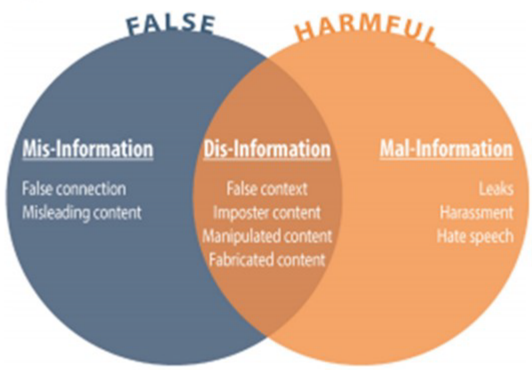
Political — Digital engagement

Creation of information and engagement in the digital world

Medium-short term development:

- The digital world is the new means for disseminating knowledge and engagement, and in this world, science does not win, facts do not win. Emotions trump and celebrities outshine scientists' messages.
- The Reuters Institute, drawing on First Draft fact-checks, found that messages from prominent public figures, such as politicians and celebrities, constituted only 20% of the claims in the material analysed, but made up 69% of the engagement. About 80% of the false information came from ordinary people, but their engagement was far less (European Parliamentary Research Service 2020).

Figure 1 – Information disorder



Source: EPRS based on Council of Europe.

Alternative:

- Building on the dynamics generated by the COVID-19 crisis, greater attention is given to creating clear scientific communications that can counter misinformation with data and facts.

Value

Planning horizon

The speed with which COVID has disrupted our everyday lives and the magnitude of its impact leads us to question our perception of a safe planning horizon and if it can contribute to modifying our consumer priorities

Medium-short term development:

- Consumers feel the need to increase their preparedness for difficult times, invest in more durable goods and stock up on essential products.

Alternative:

- The future is so uncertain that it is impossible to predict what will be needed to face possible further crises and when. Therefore, it is a better idea to take advantage of our current wealth/resources and have a good life here and now.

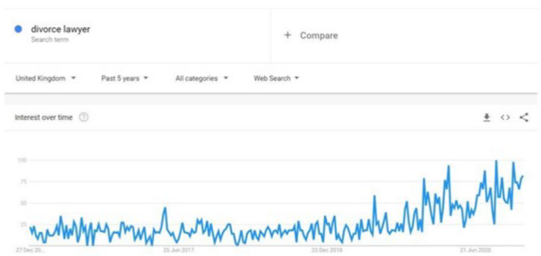
Value

Interpersonal relationships

Lockdowns have drastically changed interpersonal relationships, with impacts on divorce rates and pet adoption (Puttaiah et al., Dec 2020).

Medium-short term development:

- Marriages have come under strain, especially during the first months of lockdown. A recent study reports high divorce rates are generally connected to events such as natural catastrophes. Conversely, human-made disasters can lower divorce rates (Schwarts, 2020).
- Another spike is related to pet ownership; adoptions of dogs and cats have increased considerably across geographies (Kavin, 2020). The expected permanence of a high divorce rate is very low, as it is strictly co-related to the pandemic, while the increased pet adoption figures could represent a long-term behavioural change, as they have a positive and satisfactory function (Puttaiah et al., Dec 2020).



Alternative:

- Rise of new family structures?

Value — Sharing attitude and economy

The sharing economy is defined as "people coordinating the acquisition and distribution of a resource for a fee or other compensation" (Belk, 2014).

Medium-short term development:

- Sharing services and economies appeared to be unstoppable phenomena – but COVID-19 has severely disrupted them. A recent study reviews the impact of COVID-19 on Sharing Economy firms, service providers, consumers and regulatory bodies (Hossain 2020). The study reveals that customers have two major concerns with the SE: lack of trust and discrimination – especially as transactions often take place online. COVID-19 has created mistrust between different SE stakeholders and social distancing and hygiene concerns have highly affected consumers attitudes towards "shared services". In the near future, stringent regulations to manage the SE and hygiene protocols for services providers will improve and transform the use of the sharing economy.

Medium-short term development:

- Nascent "isolation economy" with only great online sharing activities (videos, pictures) but no "live sharing" experiences?

Parties	Anxiety	Cancelation	Job loss	Income reduction	Social distance	Hygiene & safety	Backlash	Overcoming strategy	Outcomes
Service receivers	• Stop using service • Fear of Covid-19's effect • Difficulty getting Covid-19 tests • Uncertainty about what is happening • Unpredictable future	• Booking cancelations • No option to book services • Account suspension	• No or reduced income due to job loss • No need for SE services	• Customers cannot afford many SE services due to limited or no income	• Social distancing while receiving services	• Customers prefer not to use SE services during the pandemic • Customers cannot maintain safety precautions due	• Cancelled bookings • Not respecting contract with service providers • Not respecting social distancing guidelines	• Taking extra care with cleaning, hygiene, and safety • Stop taking SE services • Maintaining social distancing	• Travel disruption • Personal financial loss • Deprived of holiday • Mental stress • Using SE services as little as possible

Hossain (2020) "The effect of COVID-19 on sharing economy activity"

Annex 3: Literature analysed in the horizon scanning

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Annex 4: Foresight Glossary

Futures Studies and Foresight general terms

Alternative futures: futures which are probable, plausible, possible or preferable, alternatives to projected futures.

Anticipation: In general: forward-looking and foresight thinking. In specific: an emerging niche/school inside futures research, advocating a discipline of anticipation, wherein the future is conceived as incorporated in all phenomena, conscious or unconscious, physical or ideational, as anticipation.

Anticipatory governance: systematic embedding and application of Strategic Foresight throughout the entire governance architecture, including policy analysis, engagement, and decision-making.

Disruption: disturbance or problems which interrupt an event, activity, or process; radical change to an existing industry or market due to a technological innovation.

Forecasting: the process of making predictions of the future based on past and present data and most commonly by analysis of trends.

Foresight: structured participatory debate about the future of complex issues.

Full foresight cycle: typically combines four types of activities: monitoring of the changes in the business environment ("strategic intelligence"), sense-making of the changes ("organizational learning"), selecting priorities and implementation.

Futures Studies/Research: the scientific field of systematic, holistic, multidisciplinary and critical long-term analysis of futures topics and alternative developments.

Participatory Foresight: open and inclusive foresight processes

Resilience: capacity to survive in the face of emerging challenges, obstacles and risks; capacity to manage the uncertainties, challenges, threats, and surprises that are an inherent part of all futures.

Strategic Foresight/Foresight for Strategies: structured and explicit exploration of multiple futures in order to inform decision-making.

Methods and concepts applied in the project

Black swans: an extreme event, improbable, unpredictable and with dramatic impacts (unknown unknowns). Black swans are outliers, which usually appear out of the blue (COVID-19 was not a black swan).

Explorative Scenarios: scenarios that openly probe and explore several alternatives – what is possible regardless of what is desired (preferred futures).

Futures tables: matrix for creating and analyzing ideas for future developments and issues. Several types of table/matrix exist: morphological table, Field Anomaly Relaxation (FAR), cross-impact analysis, STEEPV, PESTE, PESTLE, PESTEC, CATWOE…

(Futures) Workshops: interactive and inclusive process of people tackling a challenging problem together according to a set of working principles.

Horizon scanning: the systematic outlook to detect early signs of potentially important developments.

Megatrends: strong developments.

Roadmapping: strategic process of determining in timelines the actions, steps, and resources needed to take an initiative/project/technology from vision to reality.

Scenario: manuscript of the future; description of a future situation and the course of events, which allows one to move forward from the original situation to the future situation.

Scenario development: different phases of preparing for, constructing and elaborating various scenarios.

Signals, weak and strong: a weak signal is an early sign anticipating or pointing to possibly emerging issues, which are not yet confirmed or strengthened (into a trend). Weak signals can include events, new technologies or practice or alike – pointing to a new phenomenon, which can either strengthen intro a strong signal or wither away as time passes.

Tetralemma approach: Systematic approach for thinking in alternatives. Logic of A - this could happen, B - the opposite could happen, C - none of this could happen, D - something different.

Trends: medium-strong developments.

Wild Cards: a surprising and rare event that is not (directly) man-made and would change the recent direction of development. The probability of a wild card is very low, but if realized, its impacts on the future development would be considerable.

Other important Foresight methods and concepts for foresight competence building

Backcasting: making scenarios/narratives starting from the future and coming back to the present, describing what steps had to be taken before a certain future was reached.

Causal Layered Analysis (CLA): a critical method where the topic is analysed on four different levels: 1) litany, 2) social causes, 3) discourses, values, worldviews, and 4) myths and metaphors.

Corporate Foresight: support for a corporation's strategic management to get an insight into changes in the market and the strategies of their competitors.

Deliberative Foresight: incorporation of the various needs, values and knowledge bases of stakeholders to the discussion and anticipation of the future.

Delphi (survey): anonymous expert panel process as structured communication with feedback in several rounds.

Environmental scanning: (nearly) synonym for horizon scanning.

Futures Cone: illustration of a taxonomy of alternative futures as a function of time/uncertainty.

Futures Literacy: diversifying how and why we use futures; the capacity to analyse futures-related material, and insights and use futures (future images, scenarios etc.) for today's decision-making.

Futures wheel: mindmap-like tool for addressing a topic and its direct and indirect impacts.

Futures window: cavalcade of visual weak signals, often shown as a PowerPoint-presentation.

Long Wave Analysis: thinking of society developing in cycles or waves. The Kondratieff wave theory describes the functioning of the socio-economic system as fluctuations of growth and decline in a 40-60 year cycle.

Mathematical modelling and simulation: developing a mathematical model to describe a system and its functioning.

Normative Scenarios: scenarios that have already set a preferred future as target at the outset but can have many pathways to it. Based on norms, values, aims and strategic goals.

Organizations in Foresight

Club of Rome: a global think tank, founded in 1968, to address the multiple crises facing humanity and the planet. Drawing on the collective expertise of 100 full members – scientists, economists, business leaders and former politicians – the Club seeks comprehensive solutions to the complex, interconnected challenges of our world. Its report "The Limits to Growth" alerted the world in 1972 to the consequences of the interactions between human systems and the health of our planet. Since then, more than 45 Reports have been published. Now the Club prioritises the following five key areas of impact: Climate-Planetary Emergency, Reclaiming and Reframing Economics; Rethinking Finance; Emerging New Civilization(s); Youth Leadership. https://www.clubofrome.org/

European Foresight Platform: a network-building program supported by the European Commission to support forward-looking decision-making. A global network bringing together different communities and individual professionals to share their knowledge about foresight and other methods of future studies. http://www.foresight-platform.eu/.

Foresight on Demand (FoD): DG Research and Innovation has set-up a "Foresight-On-Demand" (FOD) mechanism to respond to the demand for quick inputs to policy-making, drawn on the best available foresight knowledge. It aims at offering Commission services with timely and effective support related to crises, emerging risks, and policy challenges. The services include scanning and synthesis of foresight literature and data sources including horizon scanning, rapid foresight data collection and analysis, scenario building, and combinations of the above. The Austrian Institute of Technology (AIT) leads the FOD consortium.

Joint Research Competence Centre on Foresight (JRC): The EC JRC's main objective is to provide more anticipation culture in the EU policymaking process. Activities include generating anticipatory knowledge through continuous information gathering and analysis; shaping and running in-depth foresight processes & on-demand short future-oriented policy support formats; co-design and undertaking of foresight processes for policy DGs; establishing and animating a Community of Practice (CoP) on foresight within Europe. https://knowledge4policy.ec.europa.eu/foresight/about_en

Millennium Project: a global participatory think tank founded in 1996 under the American Council for the United Nations University, independent since 2009 and consisting of 67 Nodes around the world (= groups of institutions and individuals that connect local and global perspectives). Its mission is to improve thinking about the future and make that thinking available through a variety of media for feedback to accumulate wisdom about the future for better decisions today. Publishes State of the Future reports, upkeeps 15 Global Challenges framework, and Global Futures Intelligence Systems database. http://www.millennium-project.org/about-us/

OECD Government Foresight Committee/ Network: a group of experienced strategic foresight practitioners in the public sector from countries and international organisations around the world. It aims to strengthen foresight capacity by drawing on collective experience and bringing combined future insights to bear on key issues of our times. This involves working closely with OECD staff to explore disruptive changes that could occur in the future – and their implications for policy decisions today. The aim is to challenge prevailing assumptions and stimulate ongoing dialogue on the most adaptive policies for a rapidly evolving and uncertain world. https://globalforesight.net/

UNESCO Research, Policy and Foresight Section: Since 2012, UNESCO, in its role as a global laboratory of ideas, has demonstrated that people can become aware of why and how they use the future. UNESCO propagates Futures Literacy, a universally accessible skill that builds on the innate human capacity to imagine the future. Futures Literacy Laboratories deploy action-learning and collective intelligence to co-create the meaning of sustainability, peace and inclusion where people live, work and play. https://en.unesco.org/futuresliteracy/about

World Federation of Futures Studies (WFSF): a UNESCO and UN consultative partner and global NGO with members in over 60 countries, founded in 1973. Brings together academics, researchers, practitioners, students and futures-focused institutions, offering a forum for exploration and exchange of ideas, visions for alternative futures, through long-term, big-picture thinking and radical change. Publishes magazine Human Futures. https://wfsf.org/

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