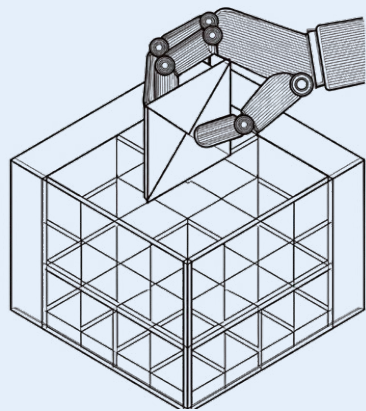
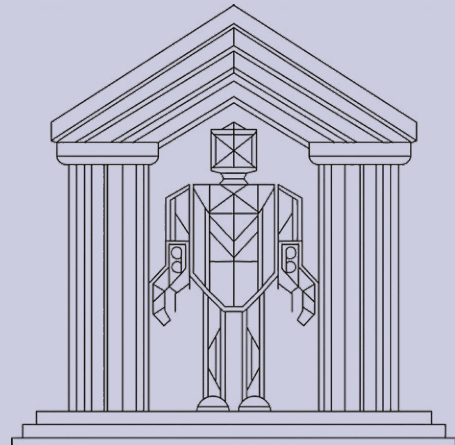


EUROPEAN TECH INSIGHTS

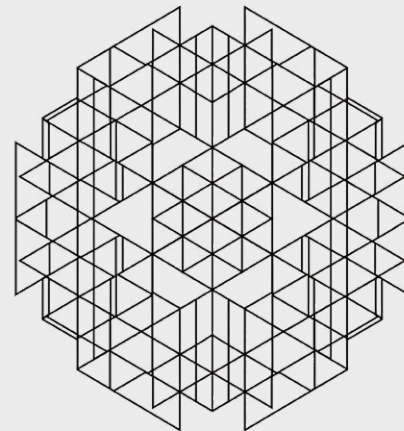
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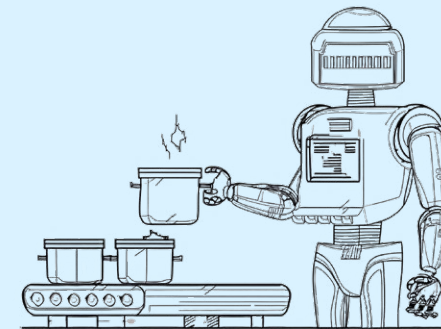
AI
IN ELECTIONS



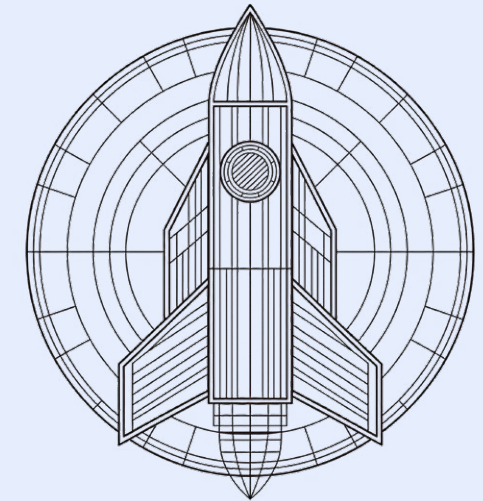
TECH FOR
PUBLIC SERVICE
DELIVERY



DIGITAL
READINESS FOR
GOVERNMENTS



ADOPTION
OF EMERGING
TECHNOLOGIES



THE
SPACE RACE

INTRODUCTION

As Europe gets ready for 2025, marking only 30 years since the launch of SMS messaging or Internet Explorer, **the integration of technologies into our lives is reaching an unprecedented scale.** The rapid deployment of AI tools and the emergence of new technologies, including neurotechnologies and other innovations, are influencing various aspects of our routines, from domestic chores to social interactions, and reaching into more complex domains like cognitive processes.

In a highly turbulent 2024 from a geopolitical perspective, marked by the war in Ukraine, the conflict in the Middle East, and a global super-electoral cycle that features the significant U.S. election, the advancement of these technologies has sometimes gone unnoticed, including their deployment by governments. It is why this year, the Center for the Governance of Change (CGC) at IE University has joined forces with Apolitical, the world's largest community of public servants, to **not only understand how European citizens perceive these**

technologies but also to include the perspectives of a small sample of public servants.

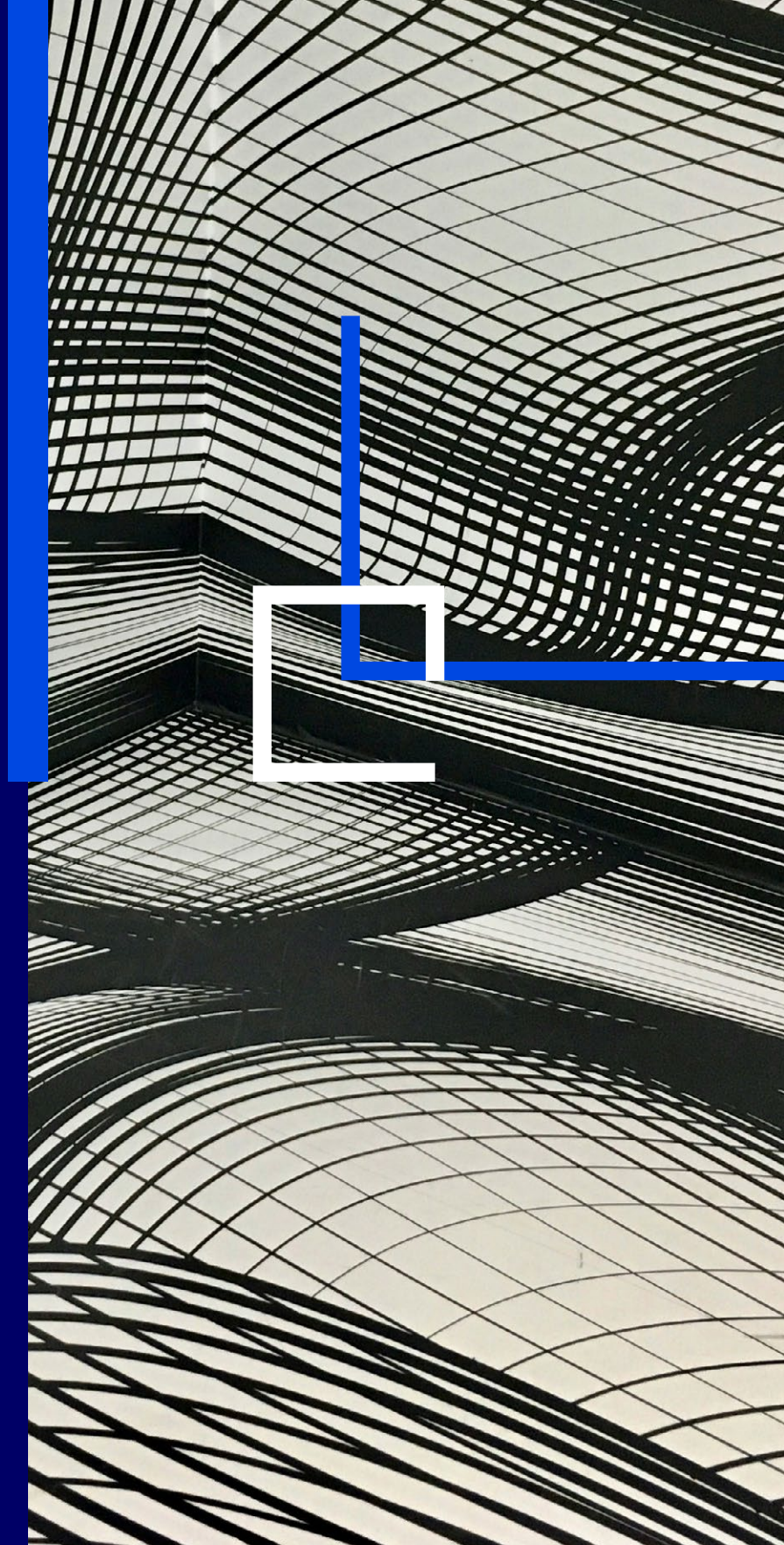
Comparing citizen and public servant views on emerging technology highlights the complexity of policymaking, which depends on open dialogue and collaboration with the public. While there is a relatively strong consensus between the two groups, **some data reveal discrepancies, particularly in the government's use and deployment of technologies such as AI.** Citizens want their governments to make the most of emerging technologies for greater efficiency, but they also expect transparency from those working on these issues in government.

For yet another year, **European citizens' attitudes toward adopting emerging technologies can be summed up as "yes, as long as core values are respected."** This is evident in their cautious optimism about AI in public life, including elections, where many trust its potential but worry about misuse.

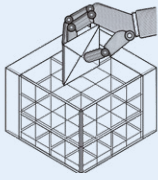
In areas like healthcare and space exploration, citizens are eager for innovation but emphasize that core values—such as ethics and inclusivity—must guide progress. There is agreement between public servants and citizens that technology should not replace human work entirely but rather enhance human capabilities, improving efficiency in areas like public service delivery and administrative tasks.

Policymakers should use these findings to guide their approach to training on emerging technology, now and in the future. Understanding citizens' current attitudes towards emerging technologies offers a chance to plan ahead, identifying the knowledge and skills governments need to govern effectively and maintain public trust.

Diego del Alcazar Benjumea,
CEO of IE University,
Chair of the Center for the Governance of Change
Robyn Scott,
Co-founder and CEO of Apolitical

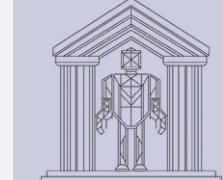


KEY HIGHLIGHTS



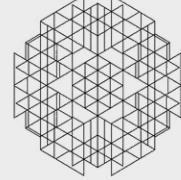
OPTIMISM FOR AI CLASHES WITH PUBLIC CONCERNS

More than a third (34%) of young Europeans would trust an AI app to vote for them, yet 40% of Europeans and 74% of public servants harbor **concerns about potential misuse of AI during elections**, like disinformation and voter manipulation. Furthermore, almost a third of Europeans (31%) believe that **AI has influenced their voting behavior**.



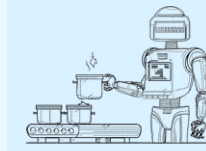
EUROPEANS BACK AI FOR PUBLIC EFFICIENCY BUT DEMAND PRIOR APPROVAL

Europeans favor the deployment of AI for public service delivery but overwhelmingly **(86%) want governments to get prior approval from them**. They endorse using AI for matching jobs for the unemployed (79% in favor) or processing tax returns (65% in favor) but **draw the line at sensitive applications such as parole (64% against)**. Public servants tend to support broader AI deployment, sometimes even without human supervision.



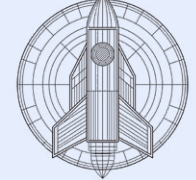
CITIZENS RATE GOVERNMENT TECH EFFORTS POSITIVELY, YET BELIEVE EUROPE IS LAGGING IN DIGITALIZATION

Citizens approve of the government's efforts to use technology with a score of 3.23 over 5. Despite this, there's a widespread perception that **Europe is not keeping pace with global digitalization**, with two thirds believing it is moving too slowly compared to China and America. While there's skepticism about government capabilities in cybersecurity **(60% believe private companies are better prepared against cyberattacks)**, a majority of Europeans support the idea of their governments developing their own software rather than using existing ones from tech companies.



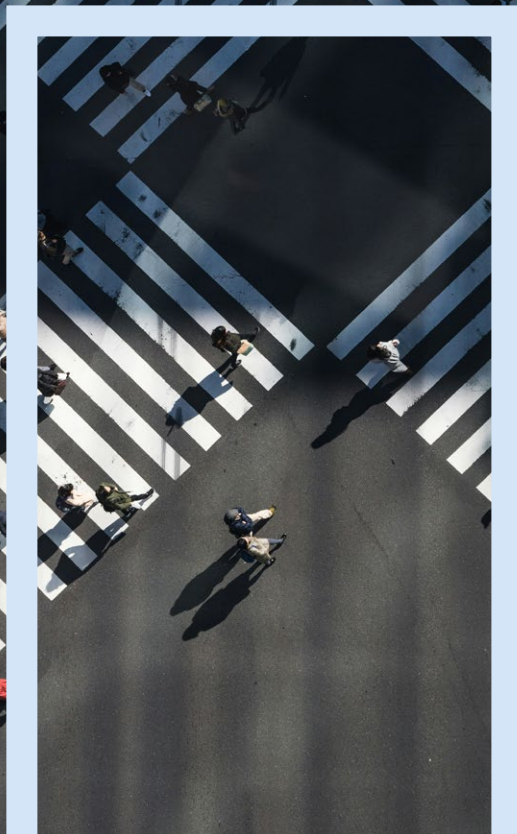
EUROPEANS EMBRACE HEALTH INNOVATIONS AND TECH CONVENIENCE

Europeans support the adoption of technologies that enhance healthcare and daily convenience, with **75% in favor of medical devices for remote patient monitoring**, and 57% endorsing humanoid robots for household chores. Over a third **(36%) would even consider using neurostimulation devices**, while nearly half of young Europeans would be open to using ocular devices to record their memories. However, enthusiasm wanes for technologies that involve personal interactions, such as AI companions for romantic relationships.



EUROPEANS BACK CONTINUED FUNDING FOR SPACE RESEARCH

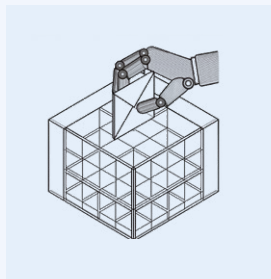
European citizens and public servants both support continued funding for space exploration, with a strong preference for advancing **scientific research and discovery—54% of citizens and up to 88% of public servants agree**. Regarding the space race, Europeans favor public-private partnerships instead of efforts led solely by governments or companies. Almost half (48%) of Europeans under 35 believe they will see people travel to space in their lifetime.



1

AI IN ELECTIONS

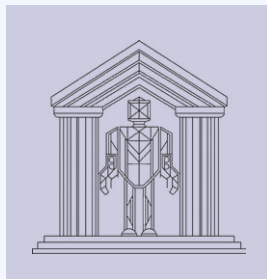
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2

TECH FOR PUBLIC SERVICE DELIVERY

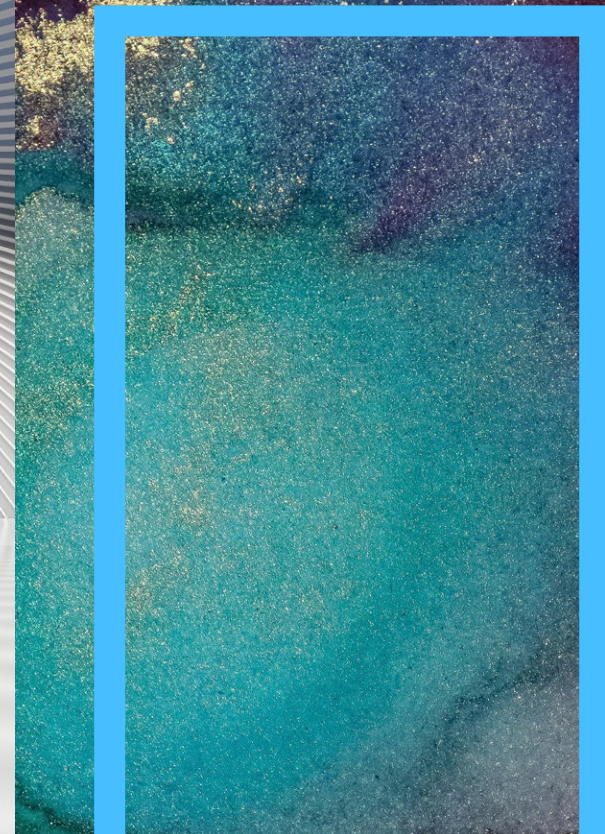
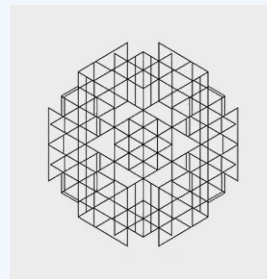
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3

DIGITAL READINESS FOR GOVERNMENTS

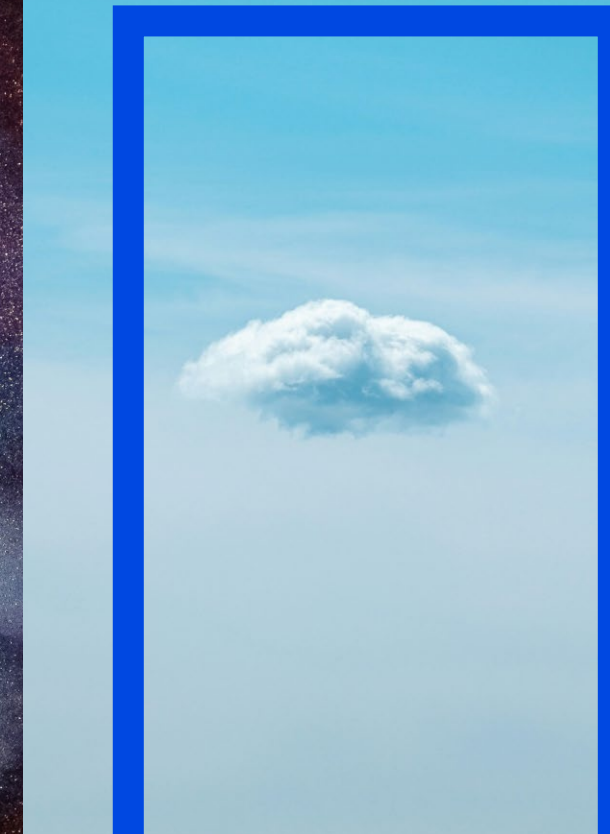
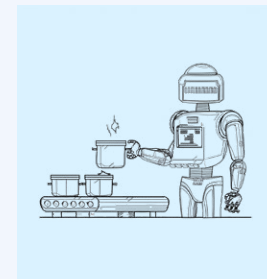
p. 21



4

ADOPTION OF EMERGING TECHNOLOGIES

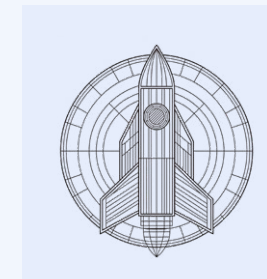
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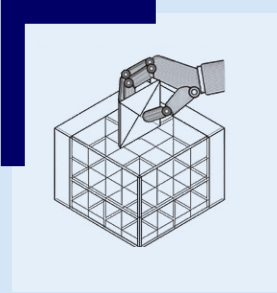
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THE SPACE RACE

p. 32



1 AI IN ELECTIONS



#01



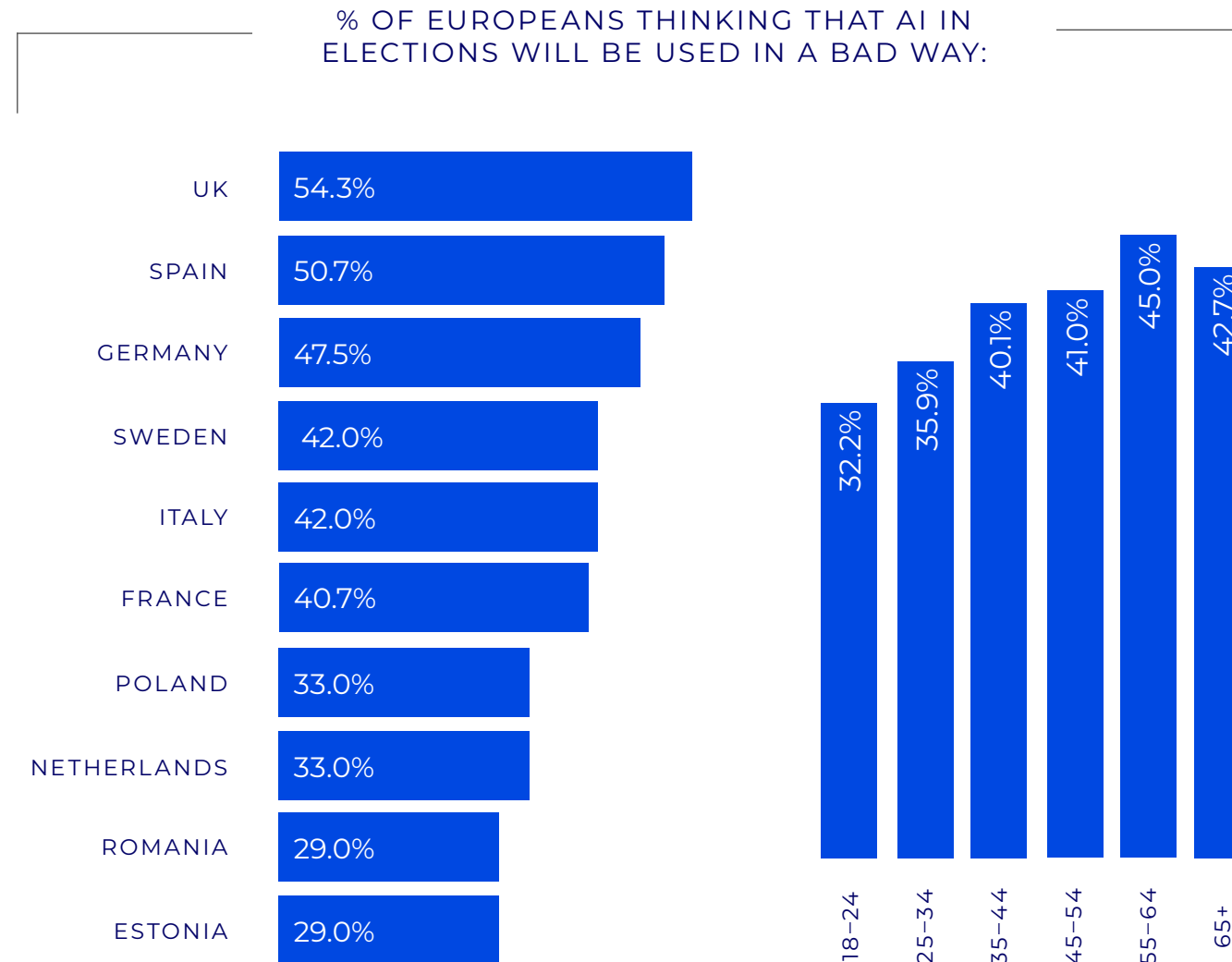
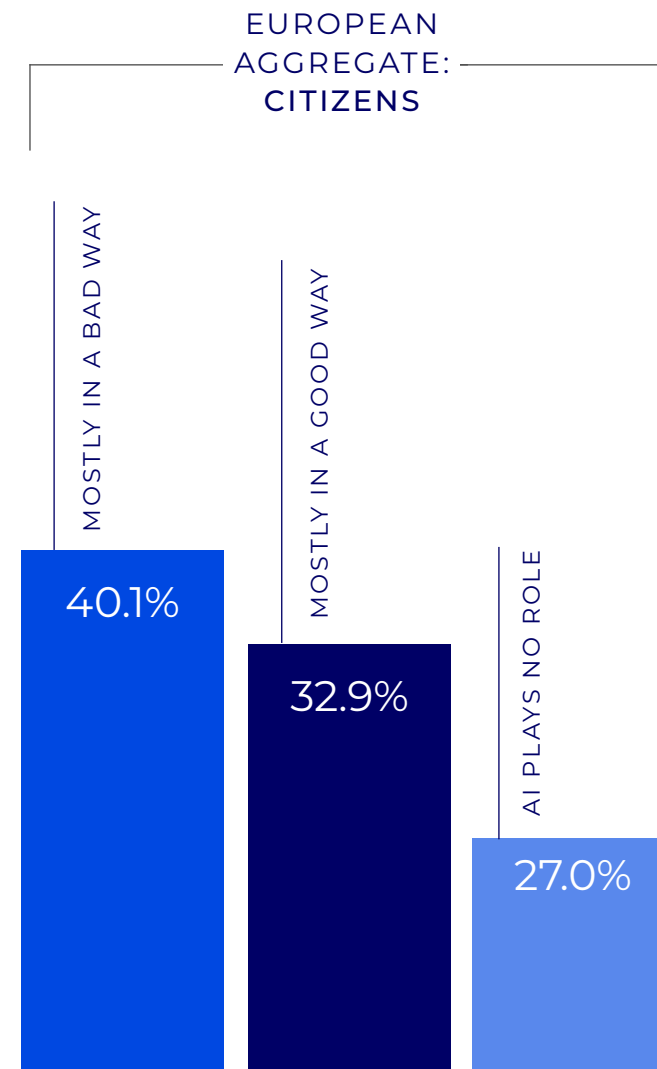
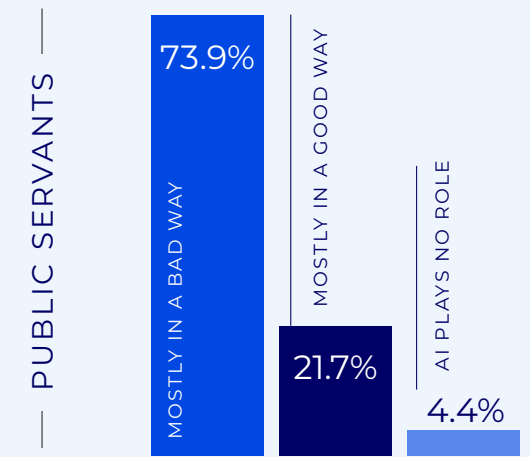
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AI IN ELECTIONS

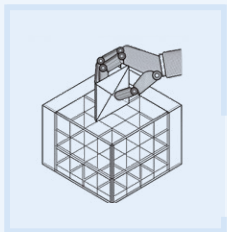
- A significant percentage of Europeans (40.1%) and an overwhelming majority of public servants (73.9%) are concerned about the potential misuse of AI in elections.
- This fear is most pronounced in the UK and Spain, where 54.3% and 50.7% of citizens express these concerns, respectively.
- Worries about AI misuse in elections grow with age among European citizens.

QUESTION: How do you think Artificial Intelligence (AI) will be used in the context of elections?

- MOSTLY IN A BAD WAY (MORE DISINFORMATION, VOTER MANIPULATION, ETC.)
- MOSTLY IN A GOOD WAY (ENGAGING VOTERS, HELPING THEM BE MORE INFORMED, ETC.)
- AI PLAYS NO ROLE IN ELECTIONS



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



#02



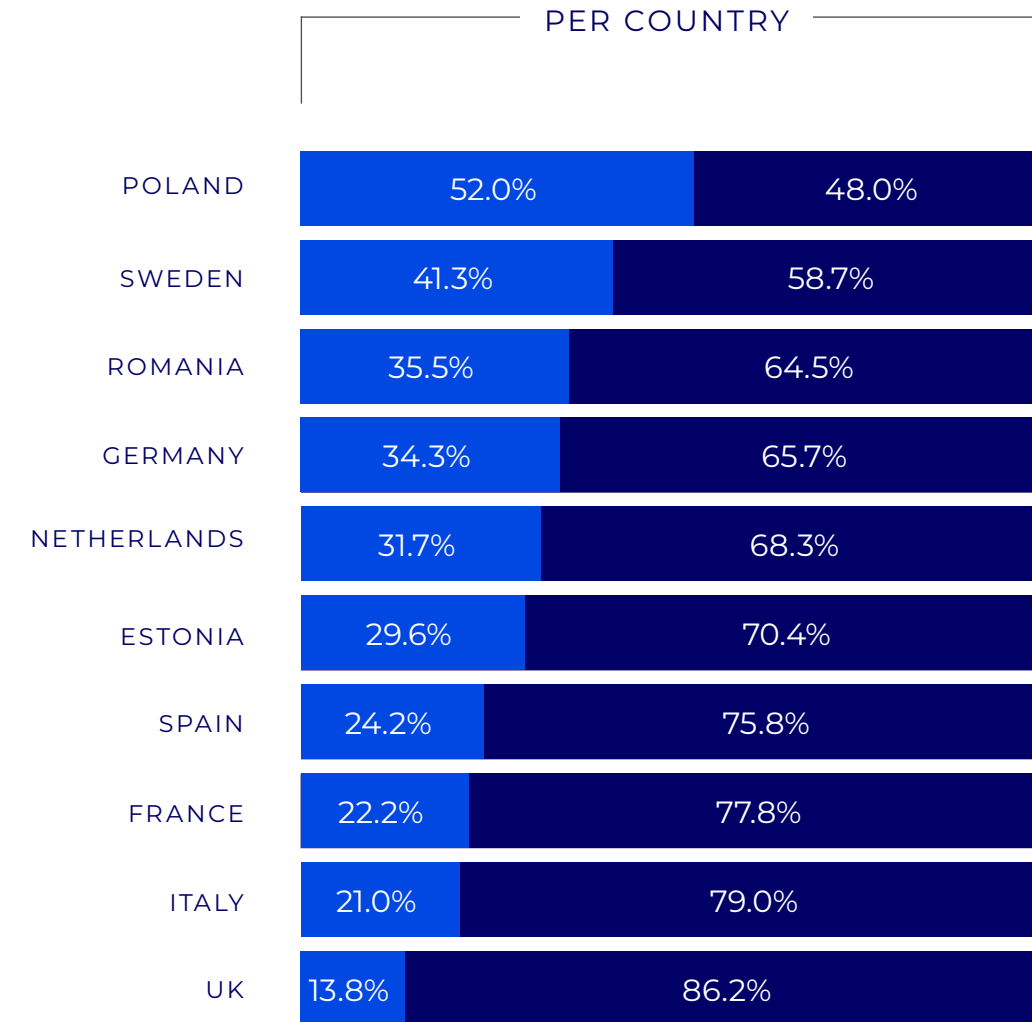
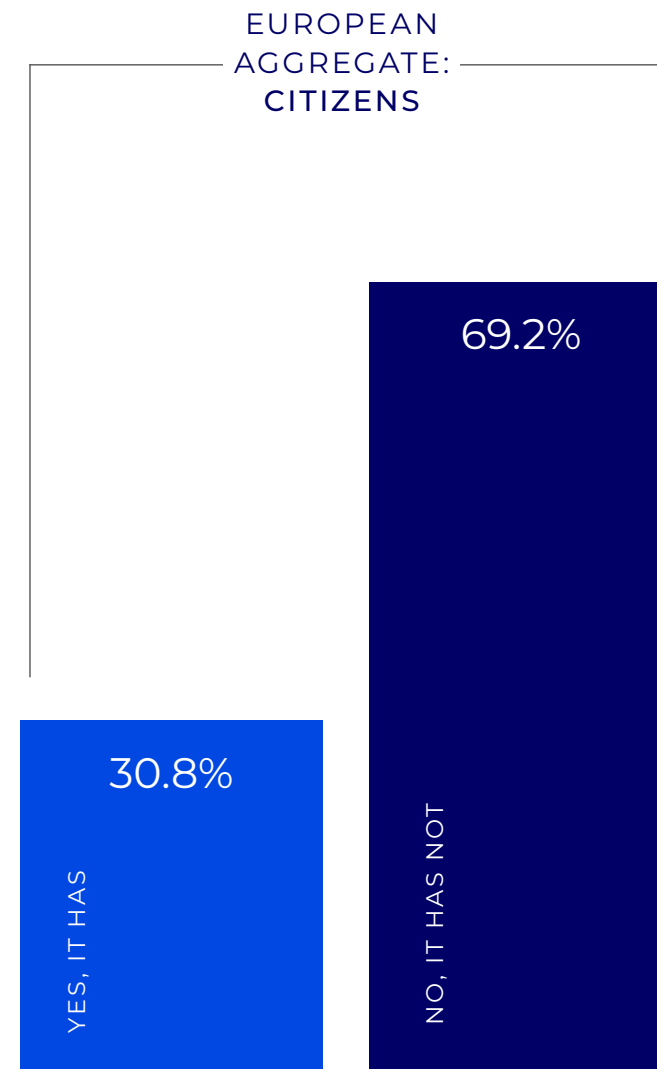
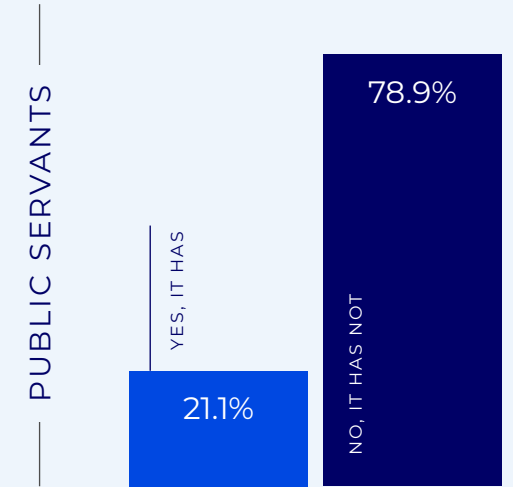
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AI IN ELECTIONS

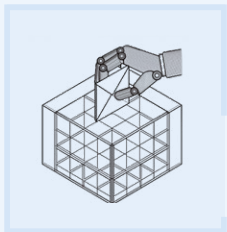
- Almost a third of Europeans (30.8%) believe that AI has influenced their voting behavior.
- Meanwhile, 21.1% of public servants think AI influenced their behaviour.
- The highest percentages of citizens who believe AI influenced their voting are in Poland (52.0%) and Sweden (41.3%).

QUESTION: Some ways in which AI can influence voting behavior include targeted political ads, AI-generated fake news, and algorithms that turn certain content viral. Do you think your vote has ever been influenced by these tools?

■ YES, IT HAS
■ NO, IT HAS NOT



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



#03

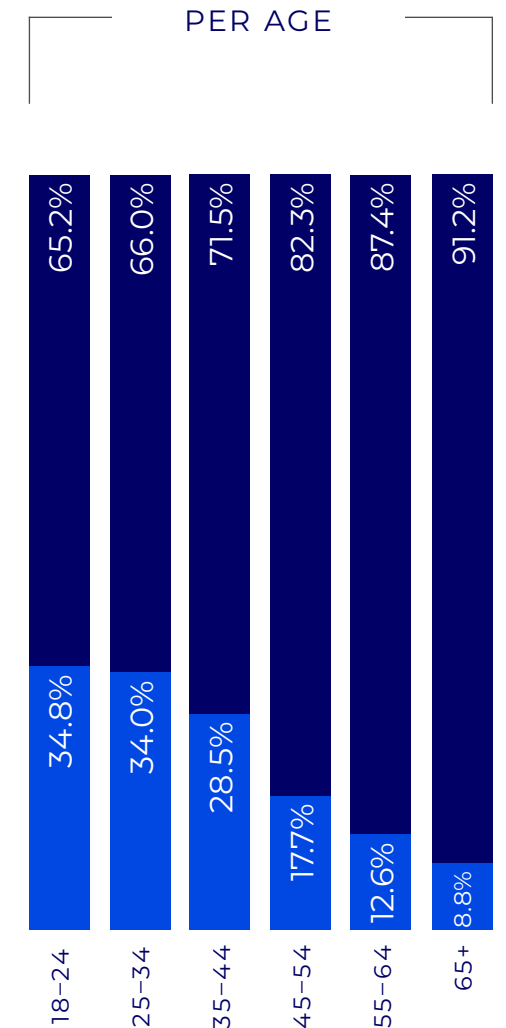
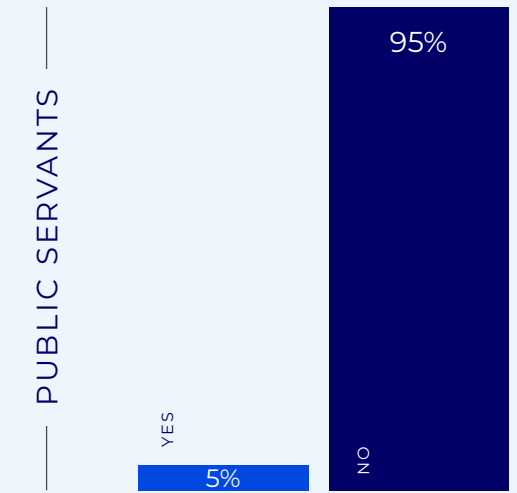
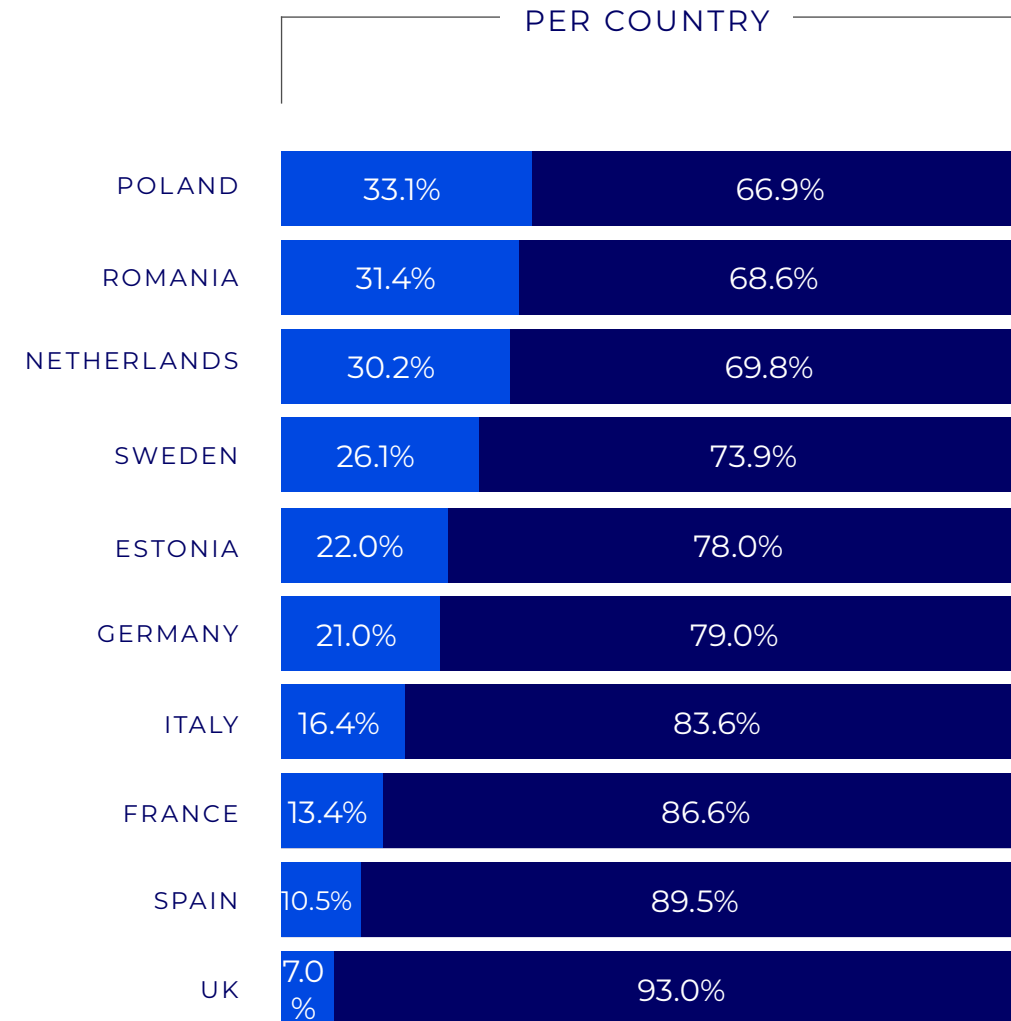
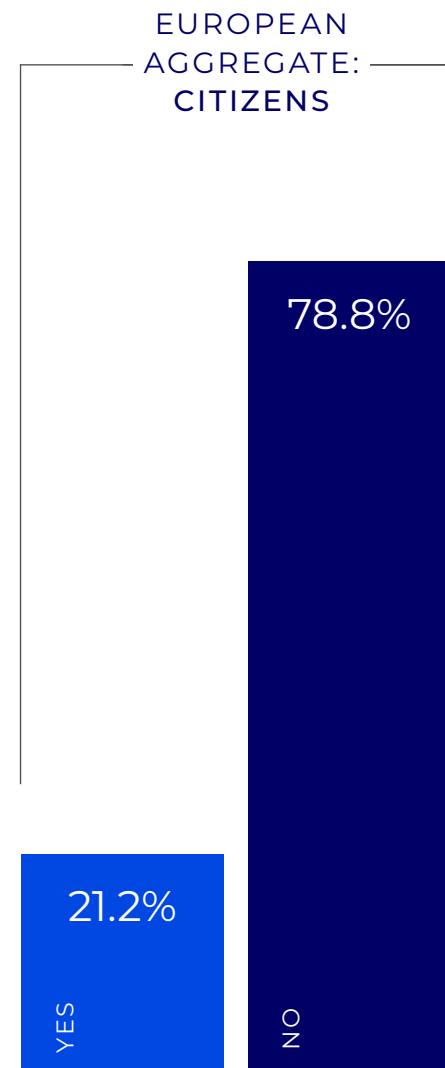


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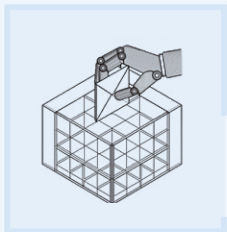
AI IN ELECTIONS

- More than a third (34.8%) of young Europeans would trust an AI app to vote for them.
- Polish (33.1%) and Romanian (31.4%) citizens show the highest receptivity to using it, while UK citizens are the least favorable, with only 7.0% trusting it.
- Public servants are strongly opposed, with a mere 5% willing to use such an app.

QUESTION: Imagine an AI app that uses data from your political opinions to suggest candidates you might like. Would you trust this app to vote for you if it were possible?



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



#04

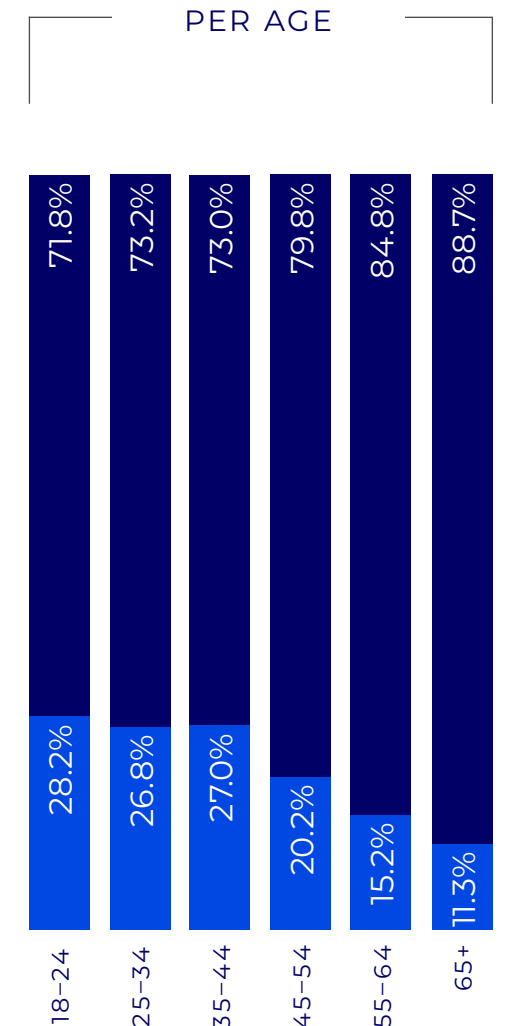
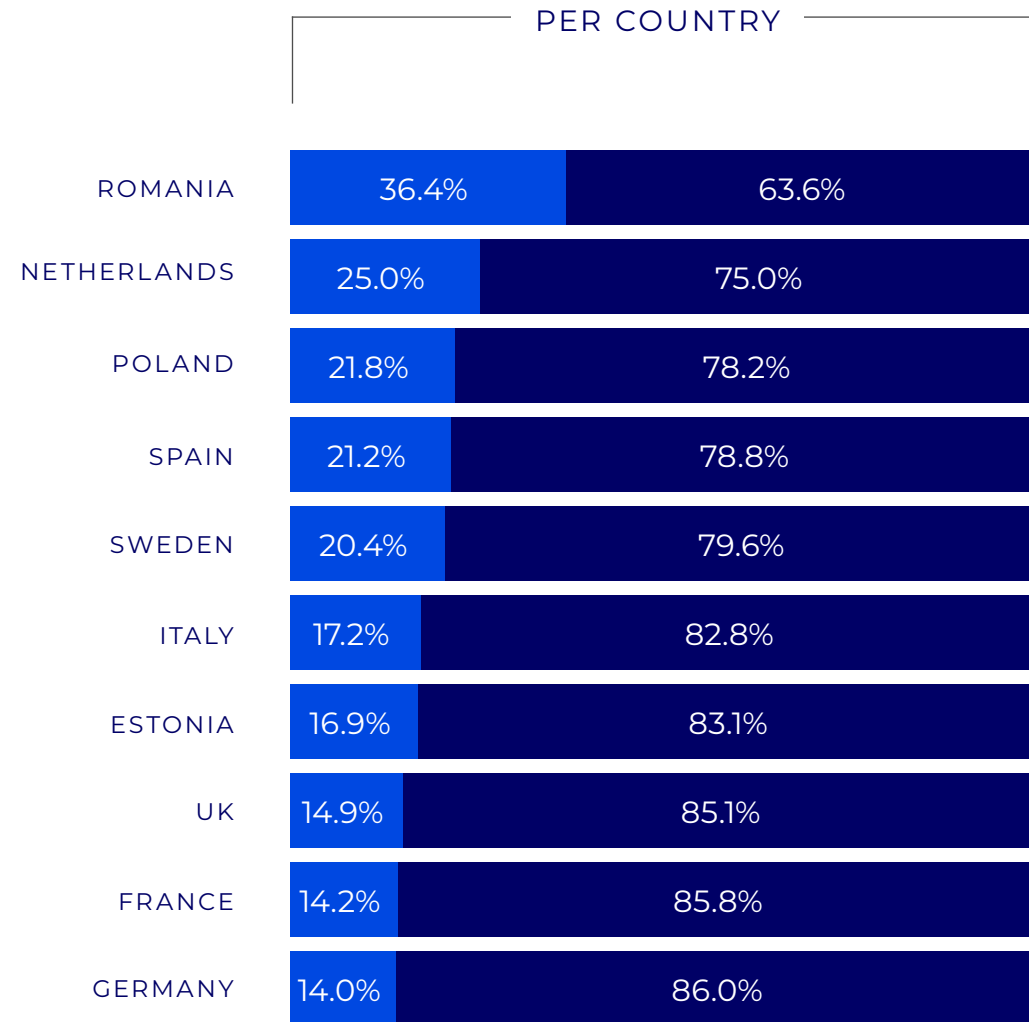
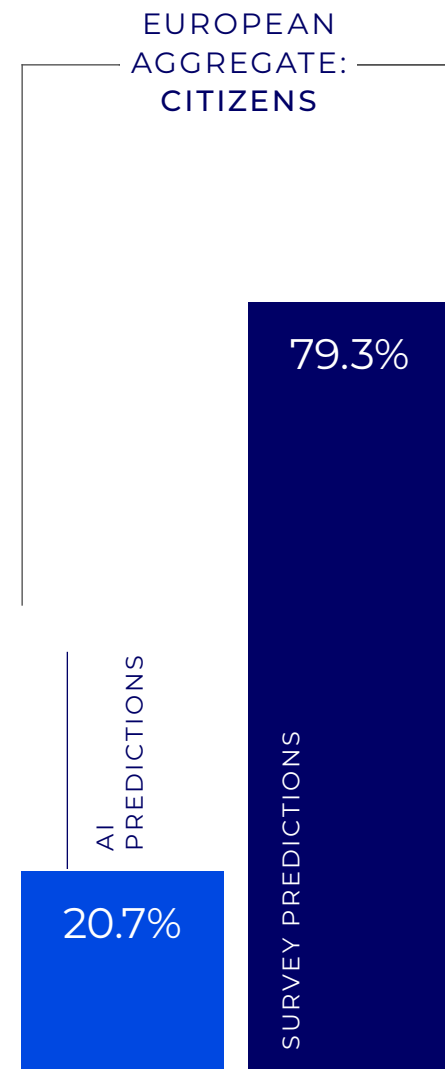
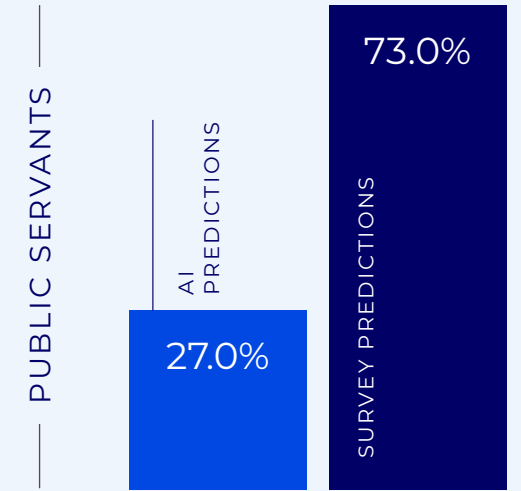
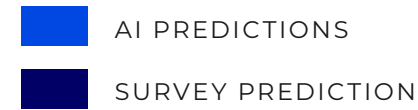


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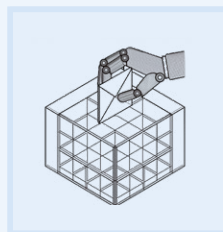
QUESTION: Who do you trust more to accurately predict election results: traditional electoral surveys or AI-based predictions?

AI IN ELECTIONS

- 27.0% of Europeans under 45 trust AI predictions more than electoral surveys.
- A similar sentiment is held by public servants, with 27.0% favoring AI.
- Trust in AI declines with age, with only 11.3% of citizens over 65 expressing confidence in it.



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



#05



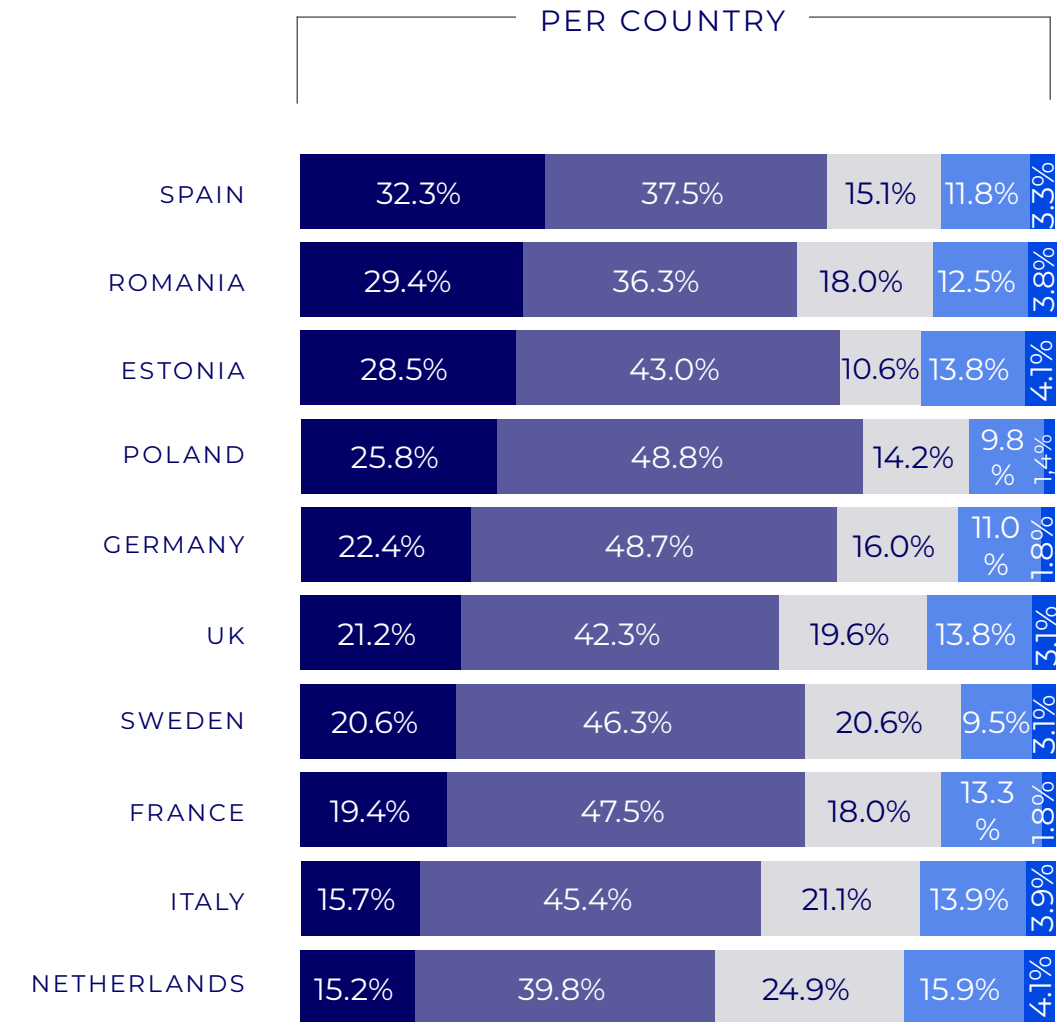
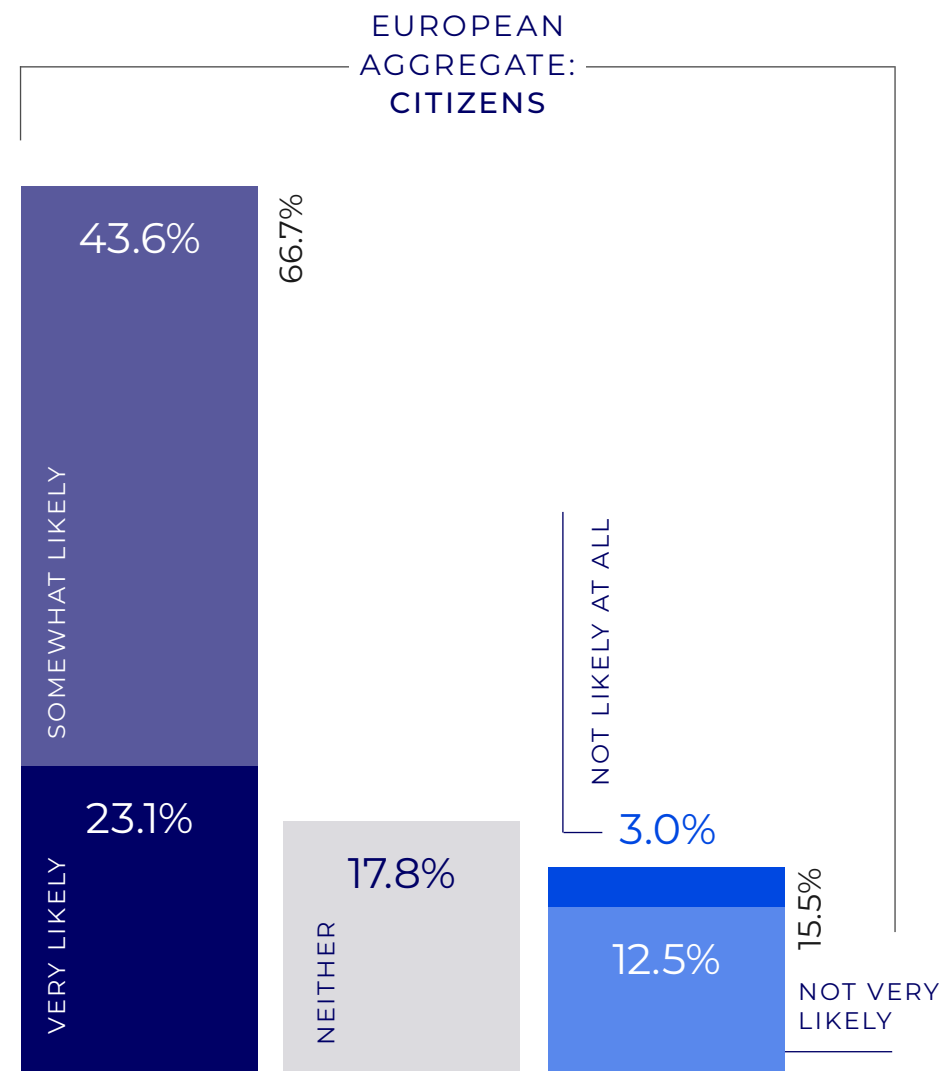
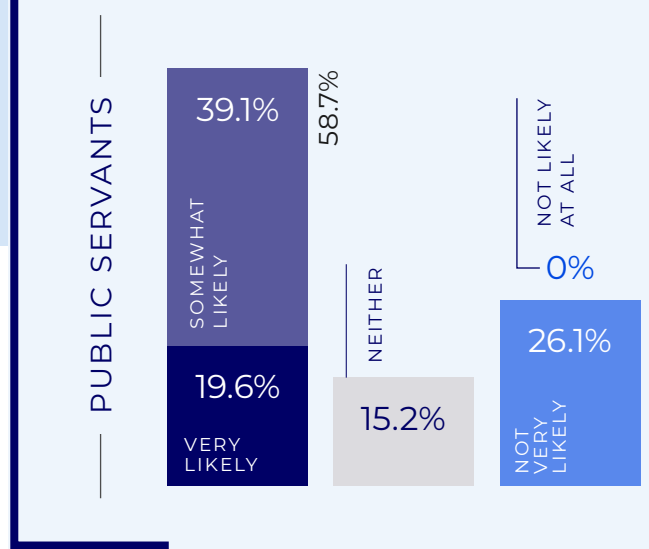
AI IN ELECTIONS

■ **Two thirds of Europeans (66.7%) believe it is likely hackers could alter the results of an election.**

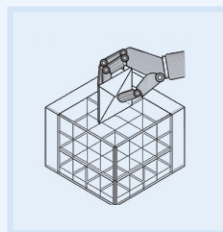
■ Among public servants, 58.7% share this belief.

■ The countries where this belief is most prevalent are Poland (74.6%), Germany (71.1%) and Estonia (71.5%), and Spain (69.8%).

QUESTION: Hackers are getting better at breaking into computers. In your opinion, how likely is it that hackers could change the results of an election?

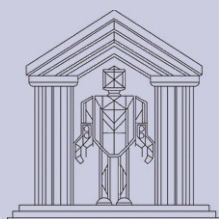


Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



2

TECH FOR PUBLIC
SERVICE DELIVERY



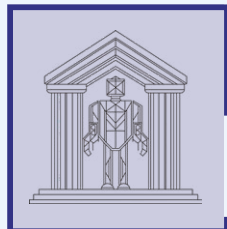
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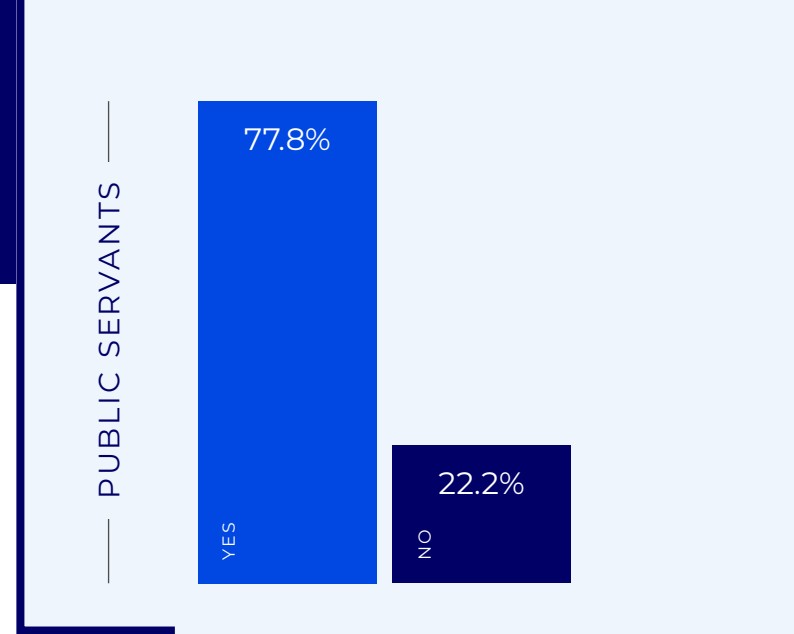
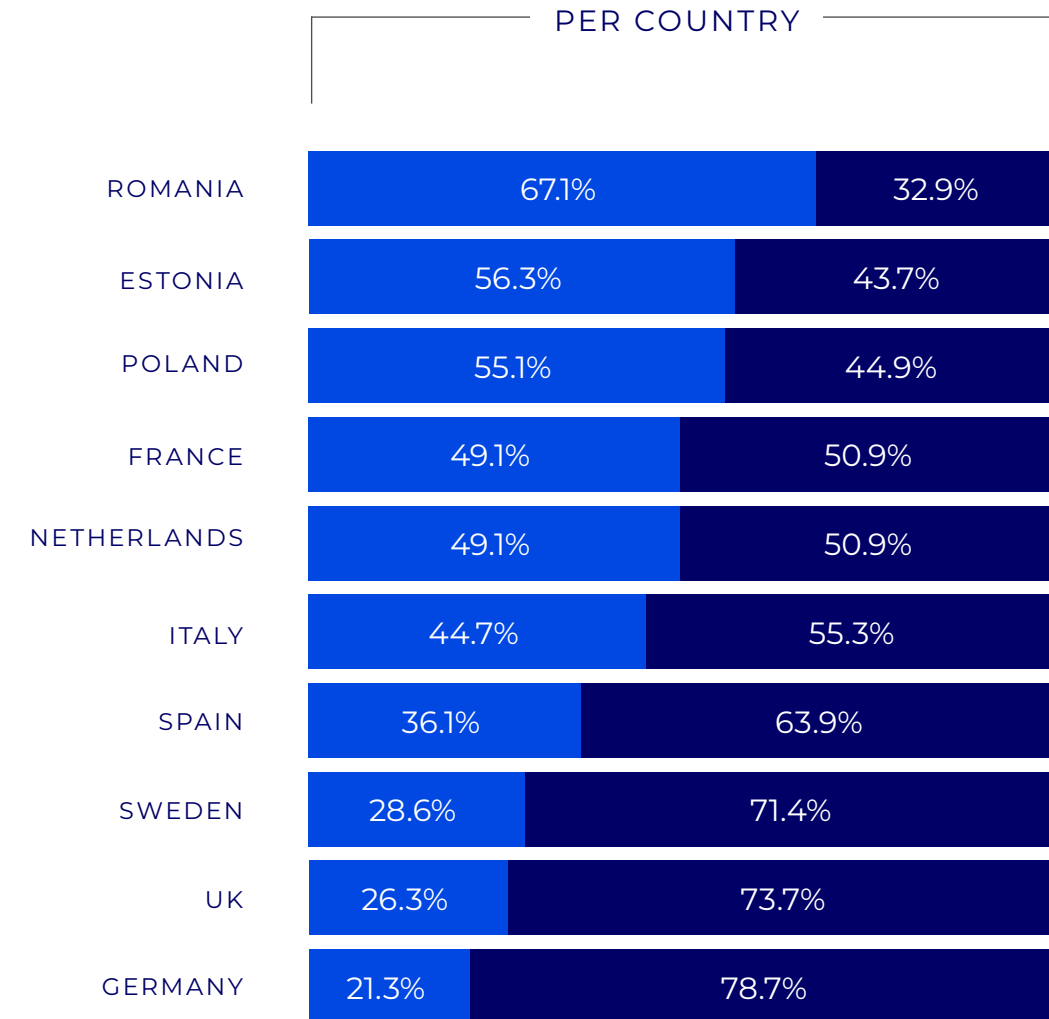
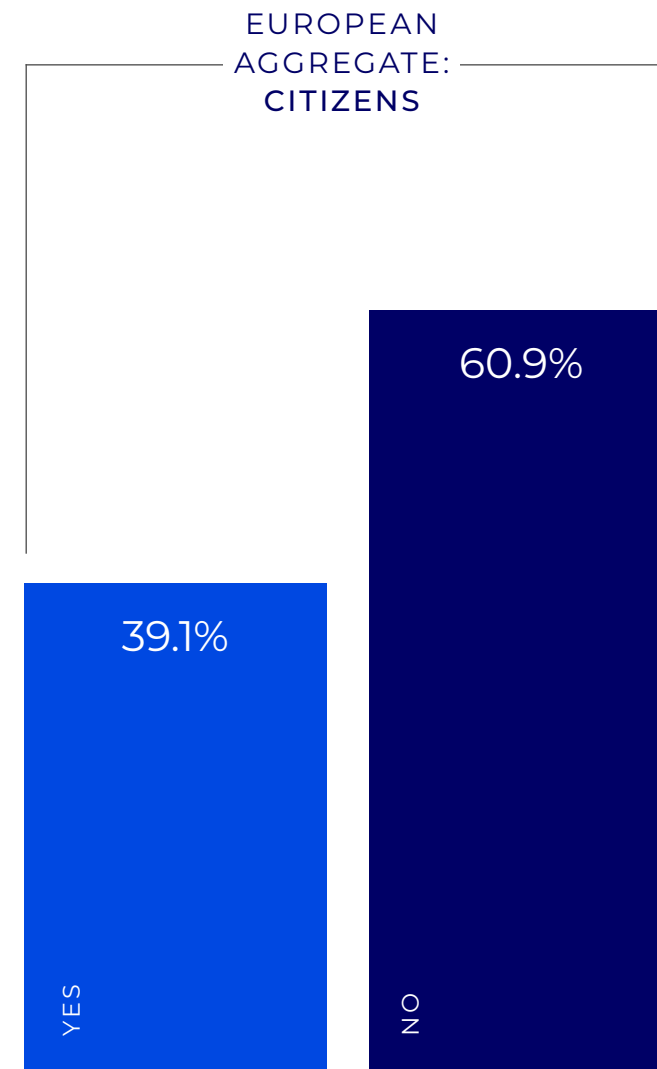
TECH FOR PUBLIC SERVICE DELIVERY

- The majority of citizens, 60.9%, declare being unaware that their government uses AI to deliver public services.
- This lack of awareness is highest in Germany (78.7%), the UK (73.7%), and Sweden (71.4%).
- In contrast, public servants are largely aware, with only 22.2% indicating they don't know about the use of AI.



QUESTION: Are you aware if your government uses AI to deliver some public services?

YES
NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

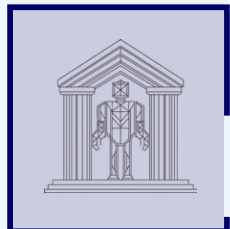
#07.1



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TECH FOR PUBLIC SERVICE DELIVERY

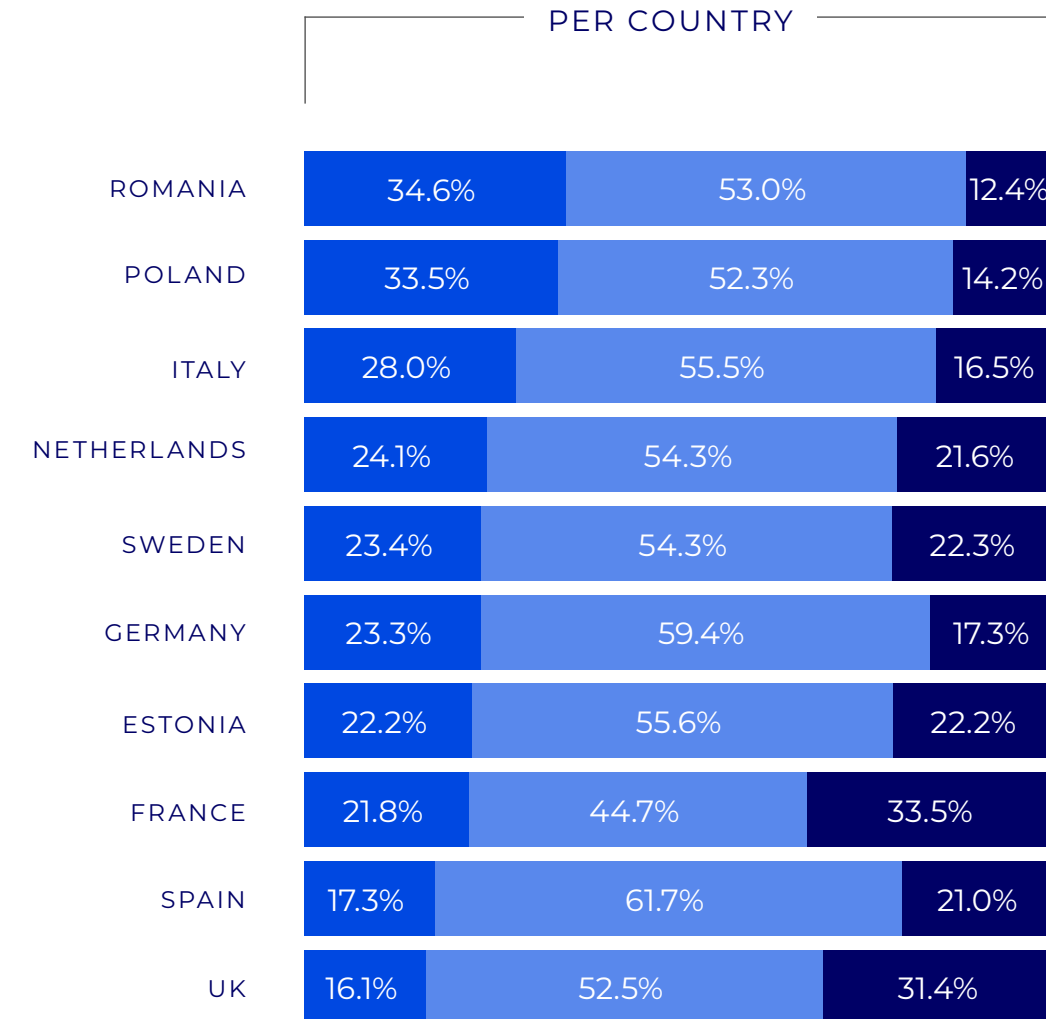
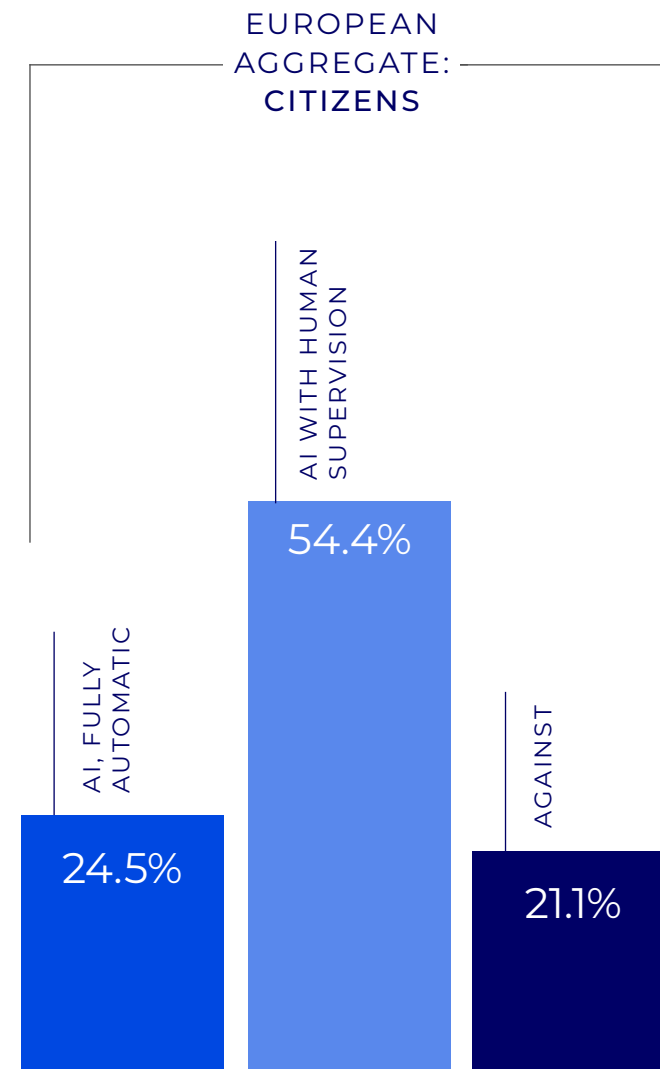
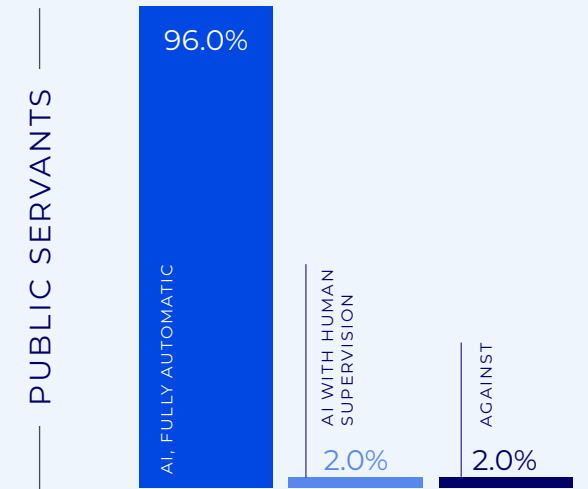
- 78.9% of Europeans are in favor of letting AI connect job seekers with employment opportunities, with 24.5% supporting this without any human supervision.
- An overwhelming 96.0% of public servants would let AI perform this task without human supervision.
- Highest reluctance to connect job seekers to opportunities with AI is found in France (33.5%) and the UK (31.4%).



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.1 Connecting job seekers to opportunities

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

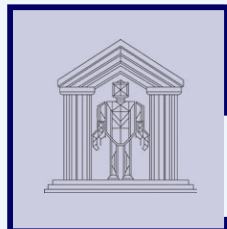
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TECH FOR PUBLIC SERVICE DELIVERY

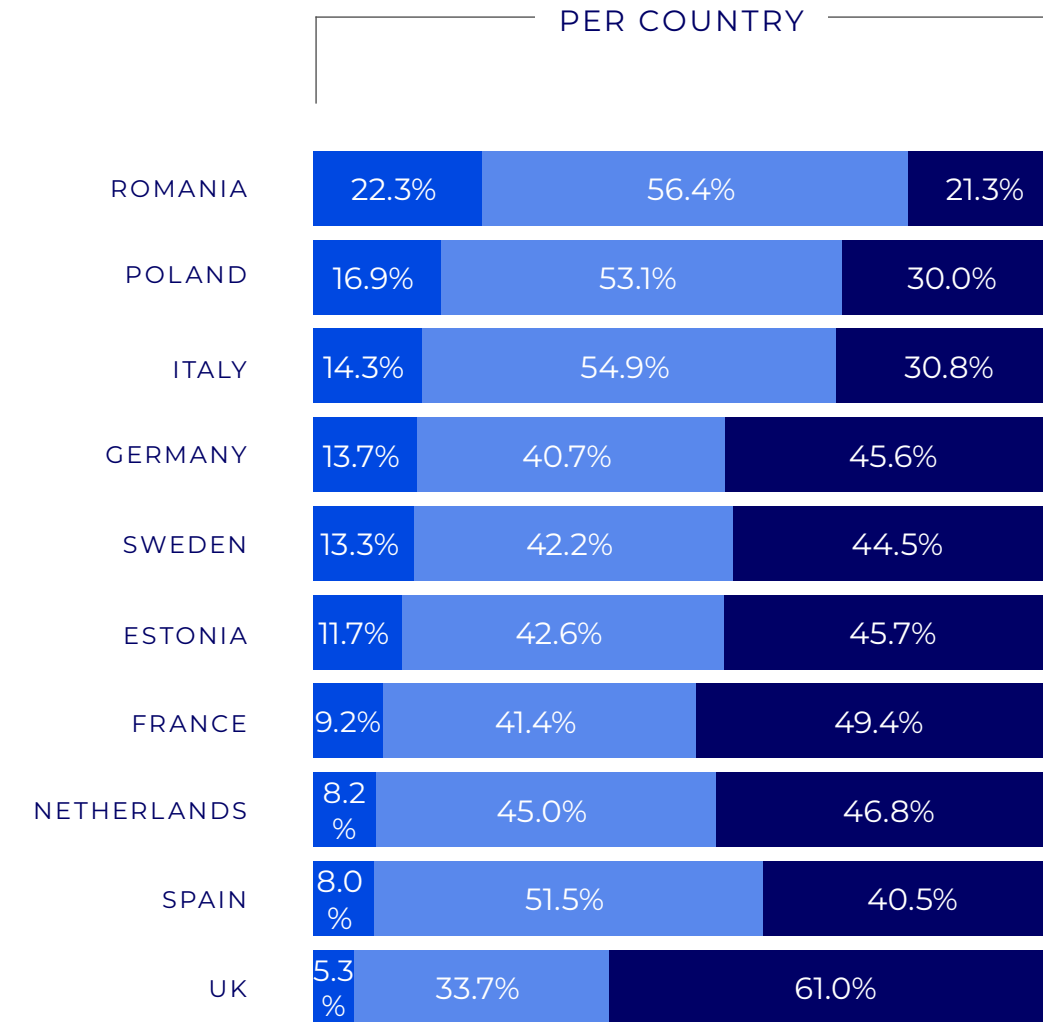
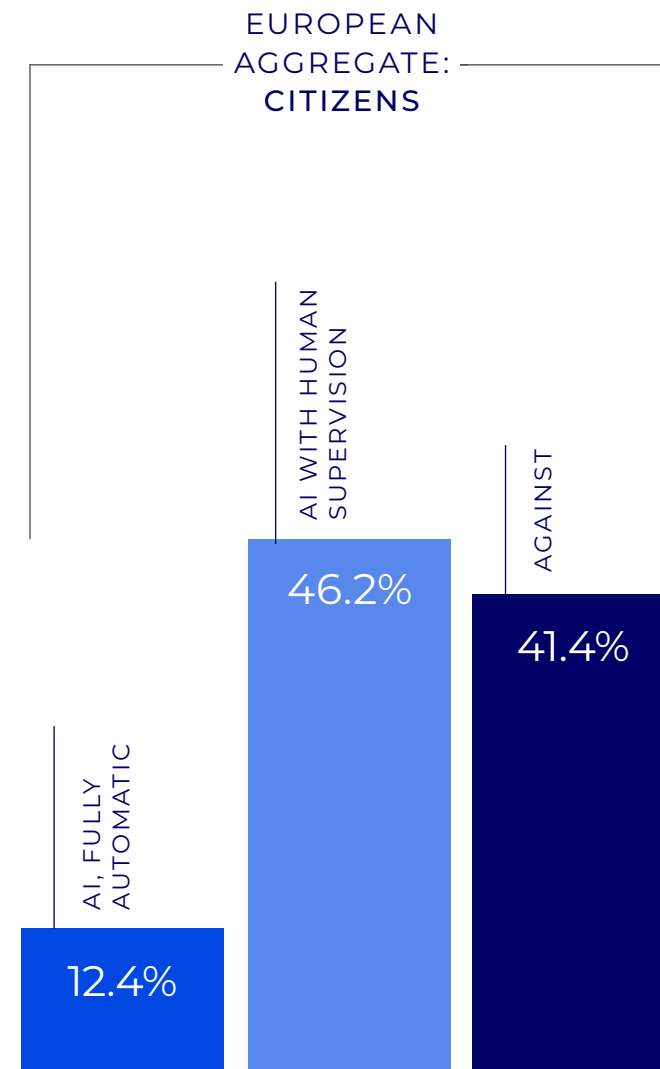
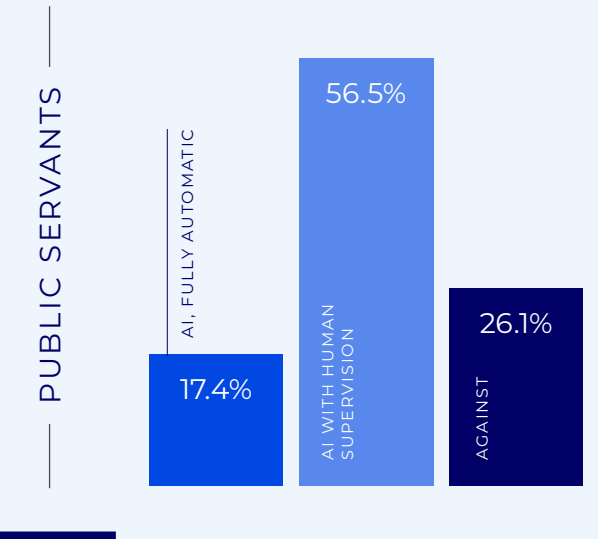
- A majority of Europeans (58.6%) trust AI to determine eligibility and amounts for welfare benefits; however, 46.2% prefer this process to include human supervision.
- The amount of support is higher among public servants (73.9%), although a majority still prefer human supervision.
- The United Kingdom is the only country where citizens are opposed, with 61.0% against it.



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.2 Determining eligibility and amounts for welfare

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

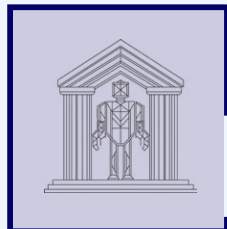
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TECH FOR PUBLIC SERVICE DELIVERY

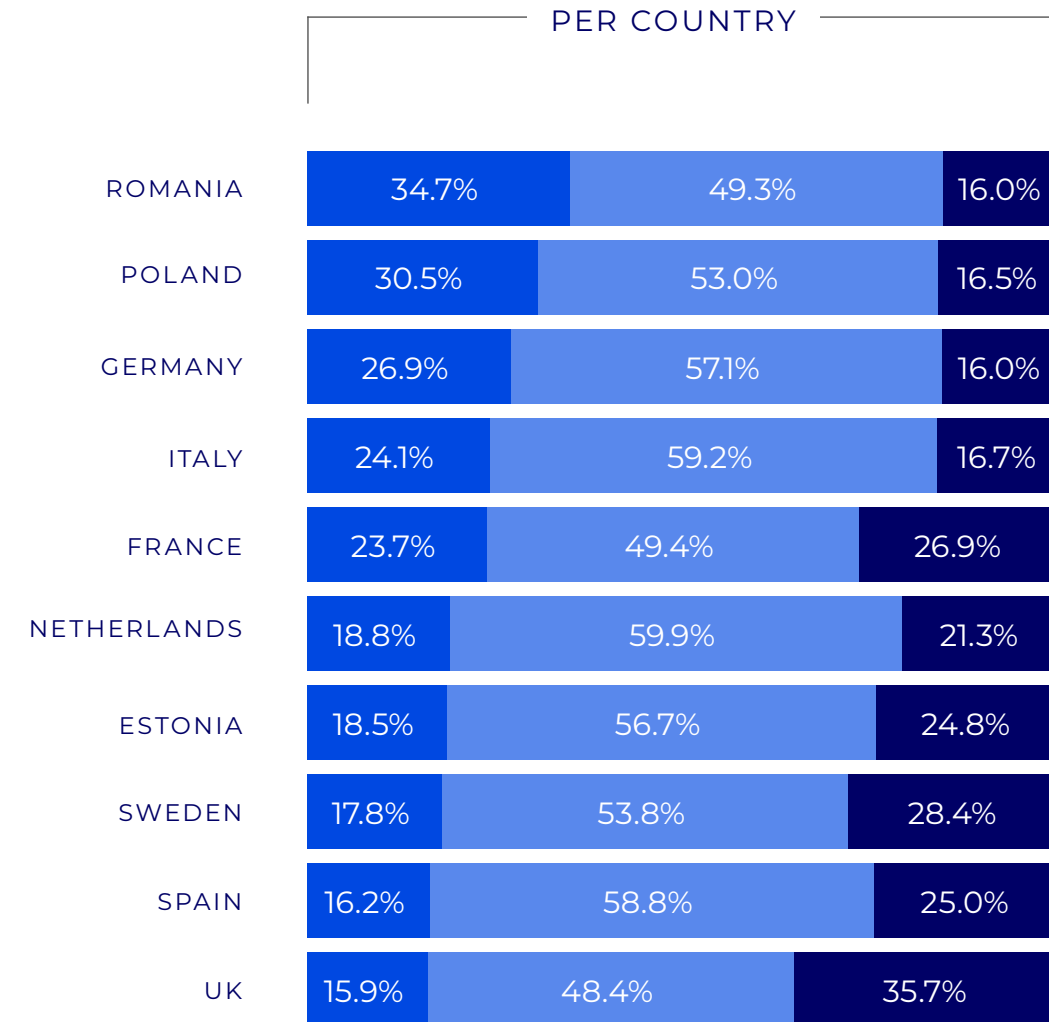
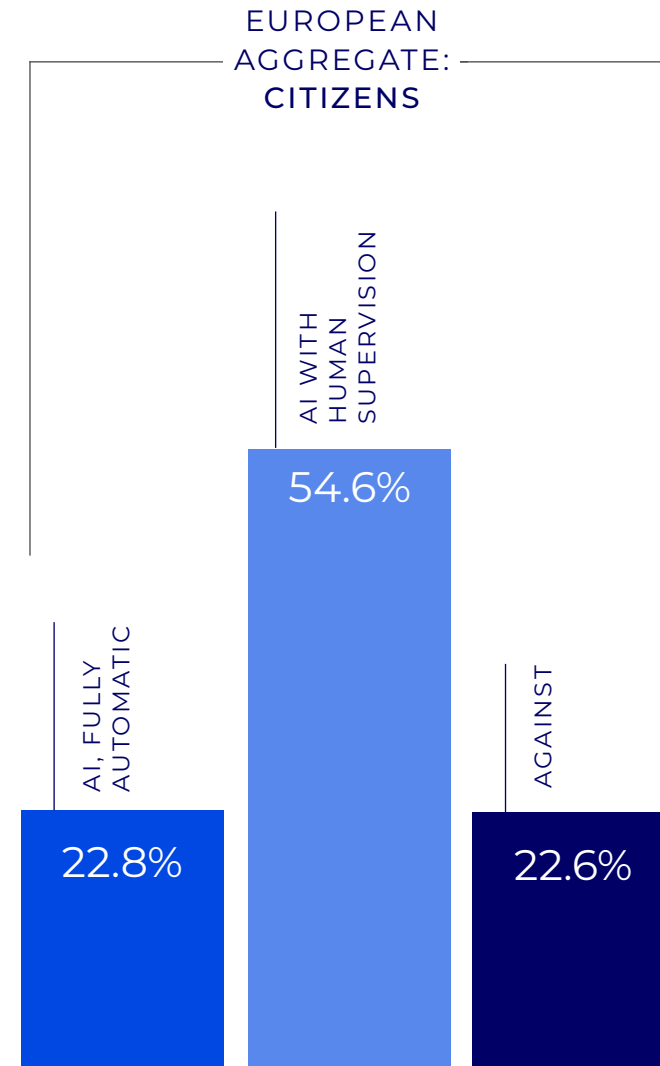
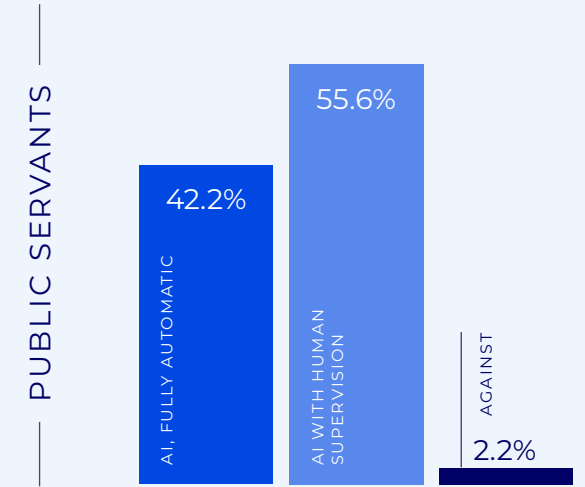
- 77.4% of Europeans are in favor of using AI to optimize traffic in cities, although most of them would still prefer it to be supervised by a human.
- An overwhelming 97.8% of public servants support this application of AI.
- The United Kingdom remains the most reluctant country, with over a third (35.7%) of its citizens opposed.



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.3 Optimizing traffic in cities

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

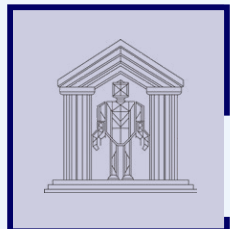
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TECH FOR PUBLIC SERVICE DELIVERY

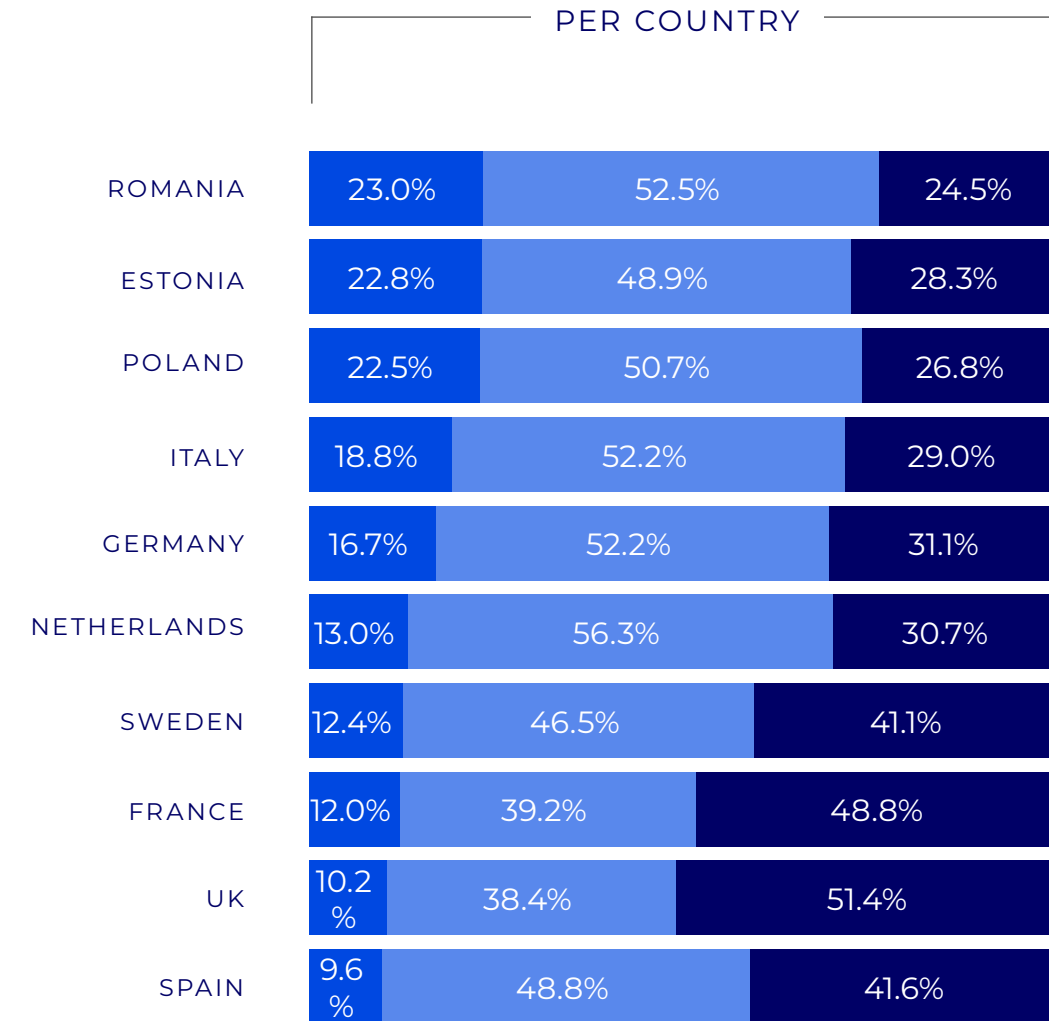
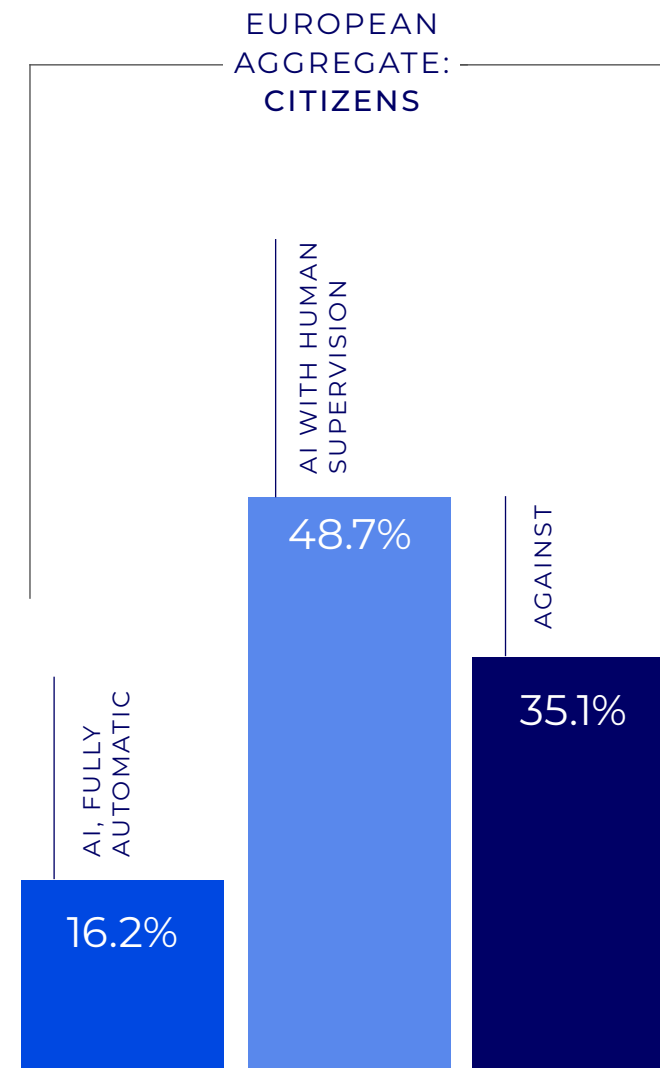
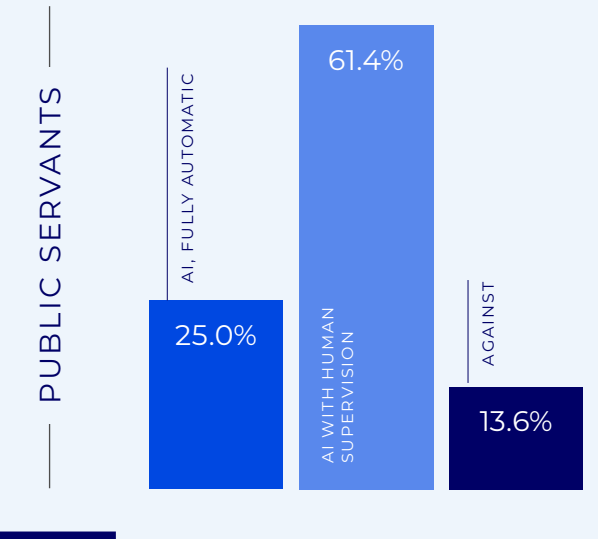
- Almost two thirds (64.9%) of Europeans would be comfortable having an AI process tax returns.
- In the UK, the majority opinion is against it, with 51.4% opposed, while 48.8% in France are also opposed.
- Among public servants, 86.4% are in favor of using AI for this purpose, but most would still prefer some human supervision.



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.4 Processing individual tax returns

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

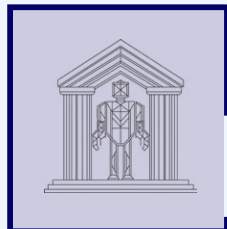
#07.5



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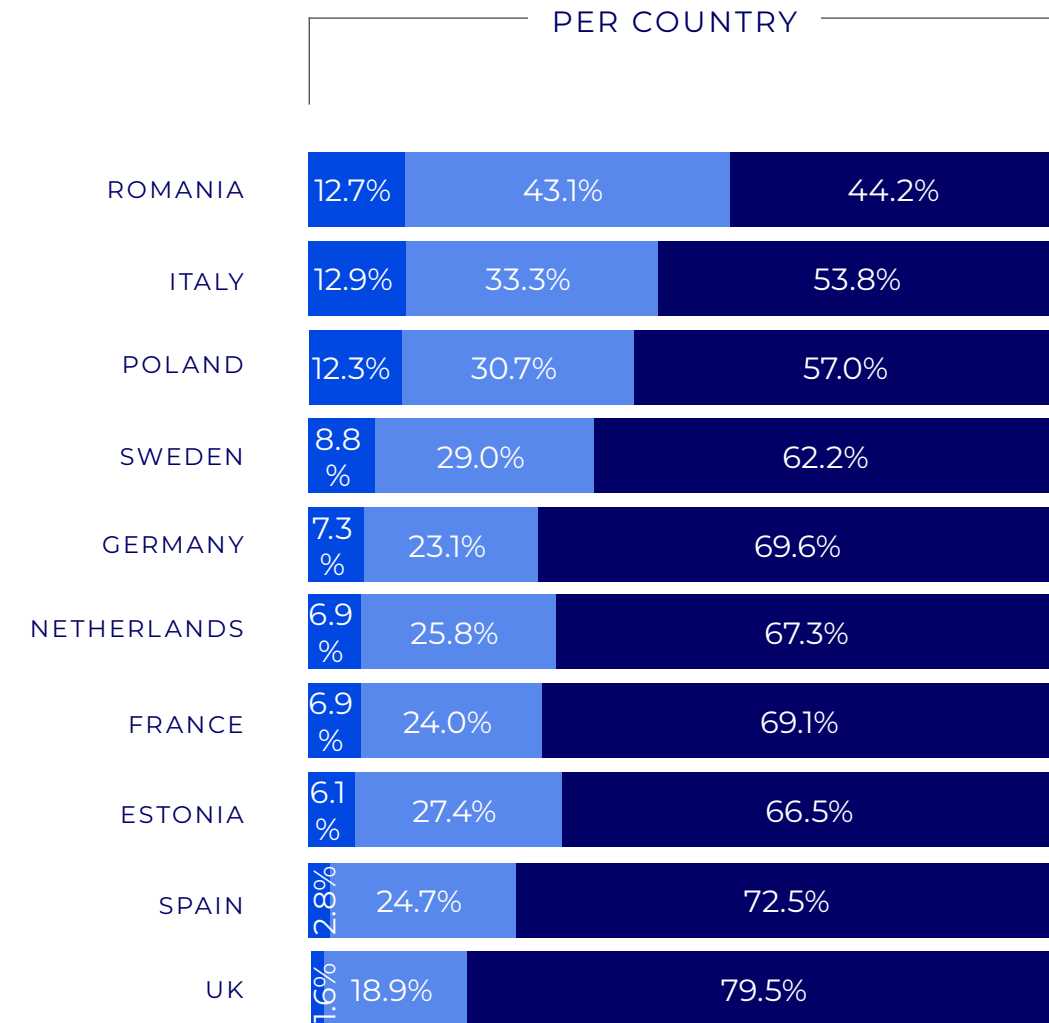
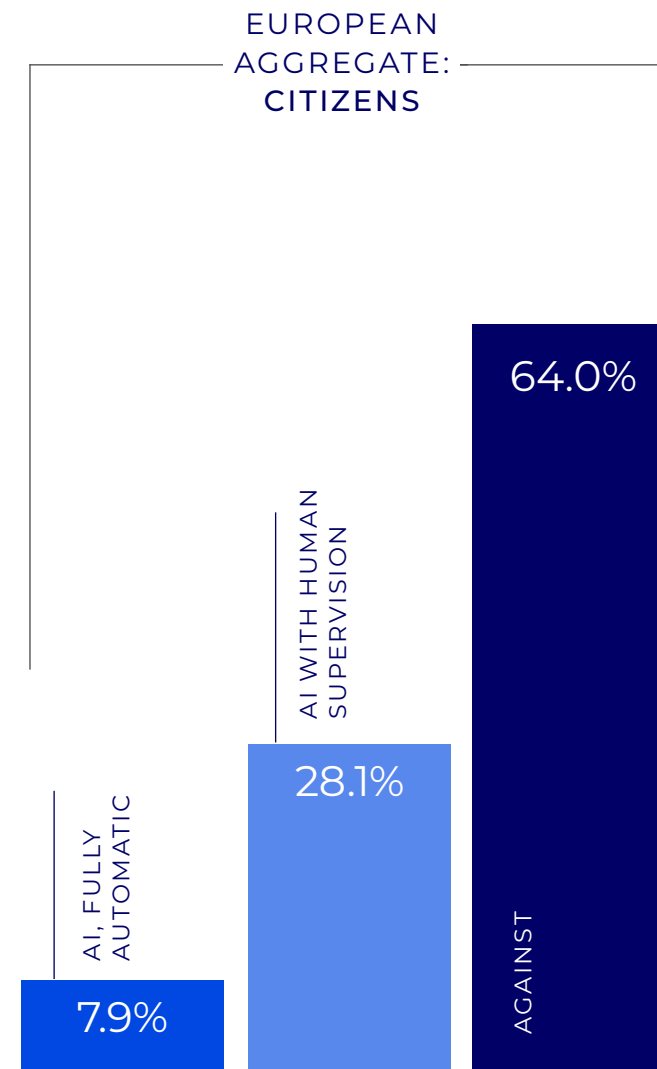
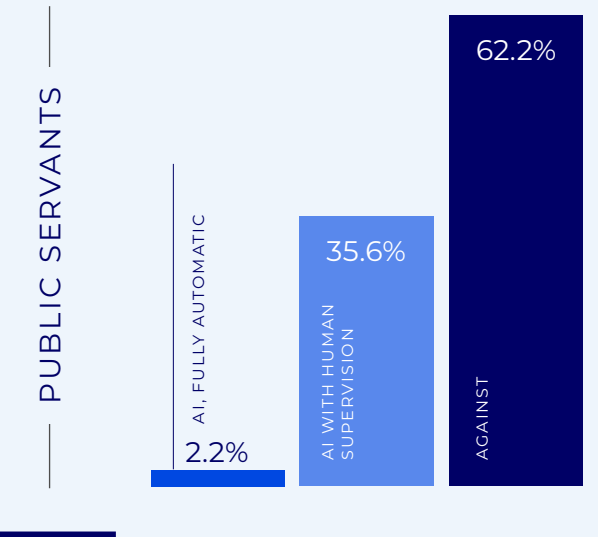
- In contrast to the views expressed in previous questions, a significant percentage of citizens (64.0%) are opposed to using AI to determine eligibility for parole.
- 62.2% of public servants share this opposition.
- Romania is the only country where a majority of people (55.8%) support using AI for parole decisions.



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.5 Determining eligibility for parole

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

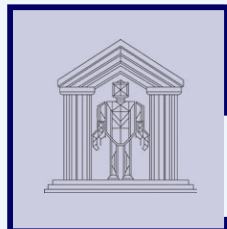
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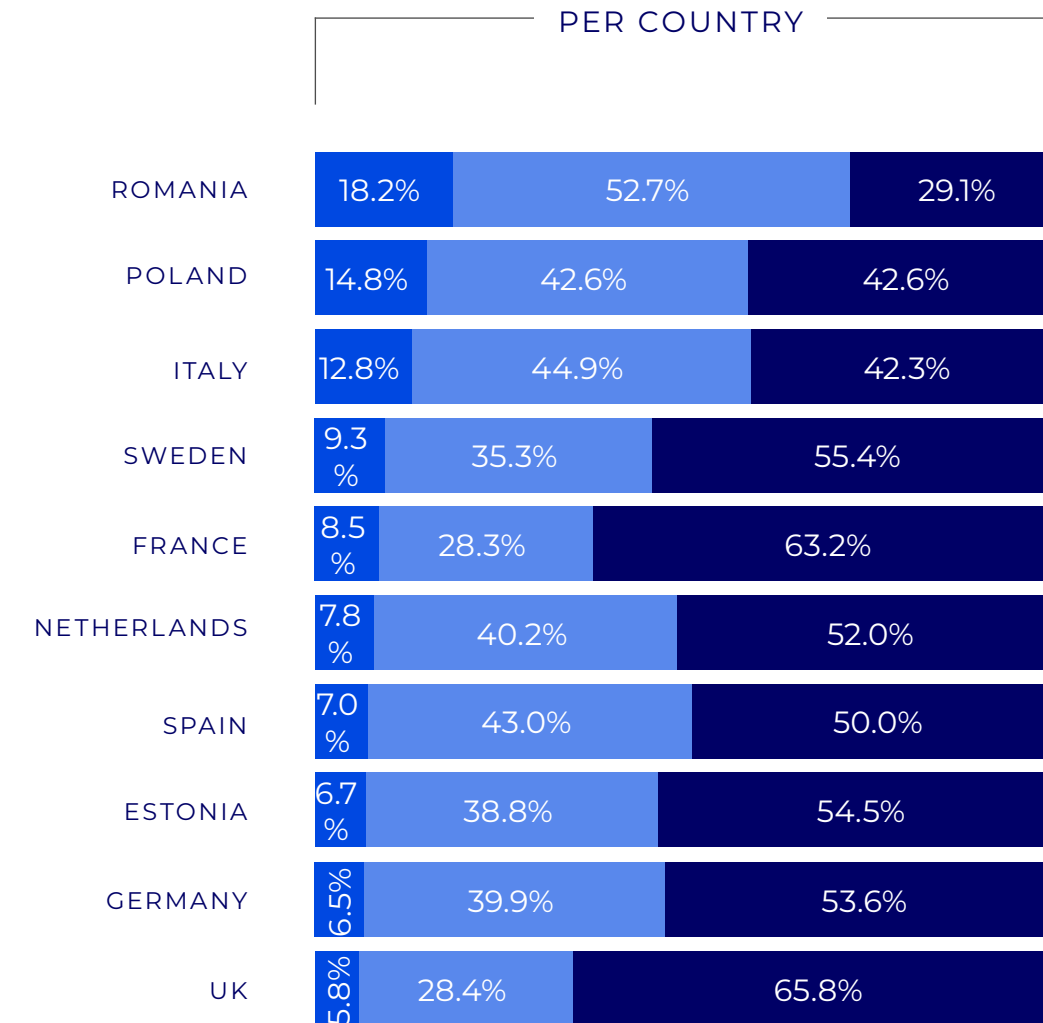
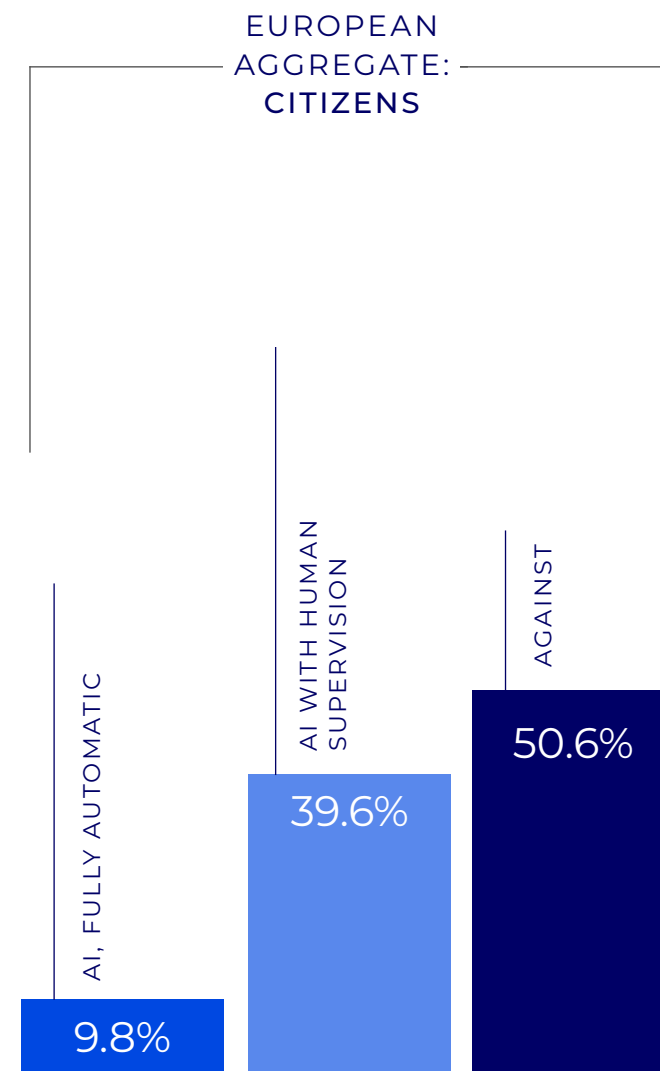
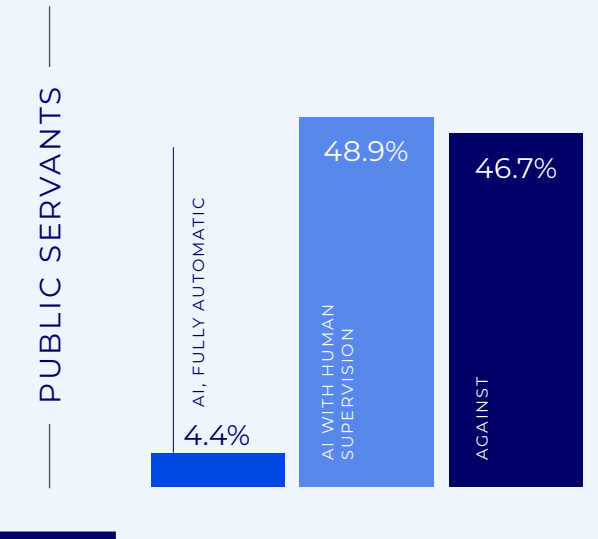
- European citizens are divided on the use of AI to determine eligibility for immigration visas, with 50.6% opposed.
- Public servants show a slight preference for its use (53.3%), but very few would support making the process fully automatic.
- The highest opposition rates are observed in the United Kingdom (65.8%) and France (63.2%).



QUESTION: Are you comfortable with the following decisions being made by AI?

#07.6 Assessing eligibility for immigration visa

- IN FAVOR OF USING AI TO MAKE IT FULLY AUTOMATIC
- IN FAVOR OF USING AI WITH SOME HUMAN SUPERVISION
- AGAINST



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

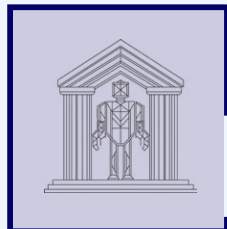
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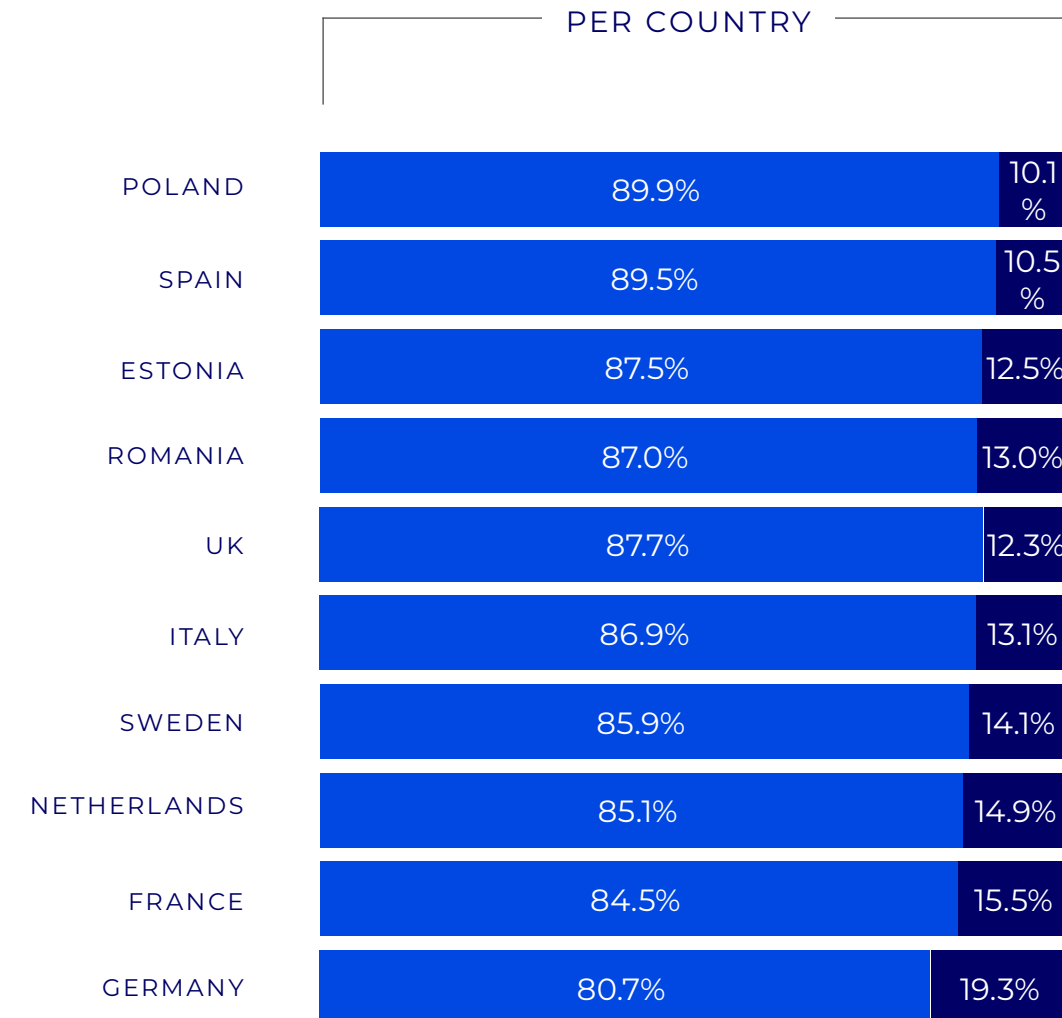
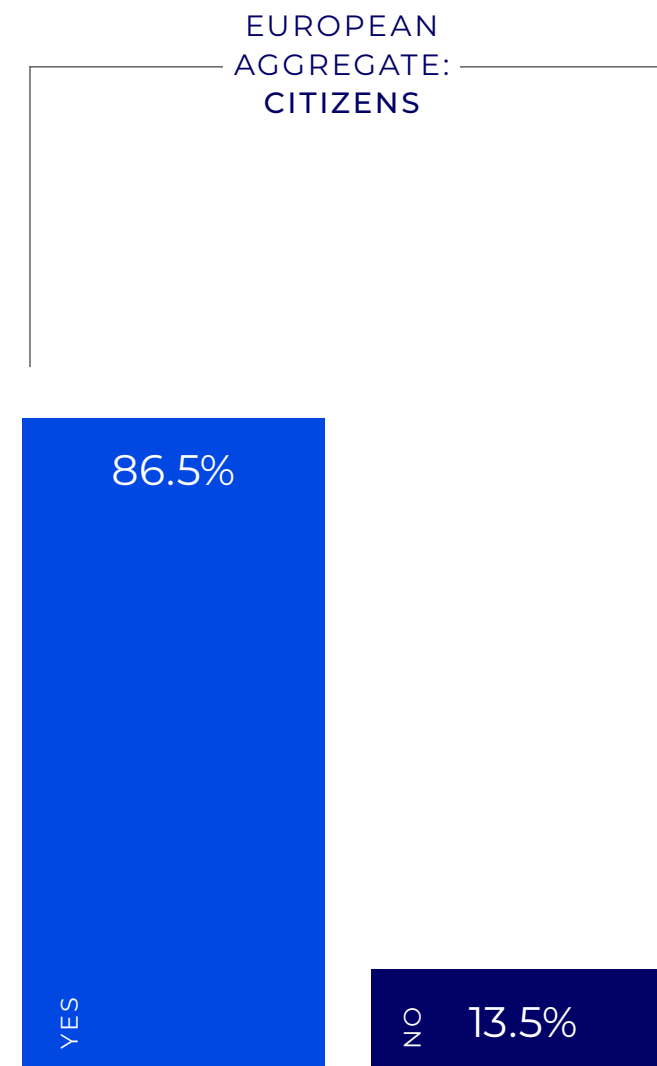
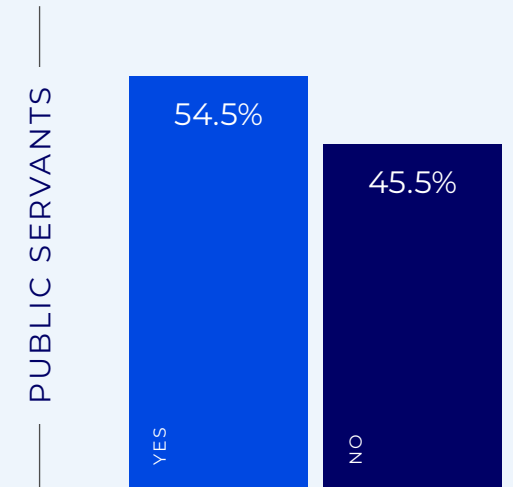
TECH FOR PUBLIC SERVICE DELIVERY

- An overwhelming majority of citizens (86.5%) would like governments to get approval from citizens before using AI to deliver public services.
- Public servants are more divided, with 54.5% in favour of governments getting approval and 45.5% against.



QUESTION: Should governments get approval from citizens before using AI for those public services? [As a reference to the six applications of AI presented in questions 7.1 to 7.6]

■ YES
■ NO



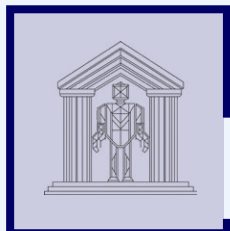
Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

#09



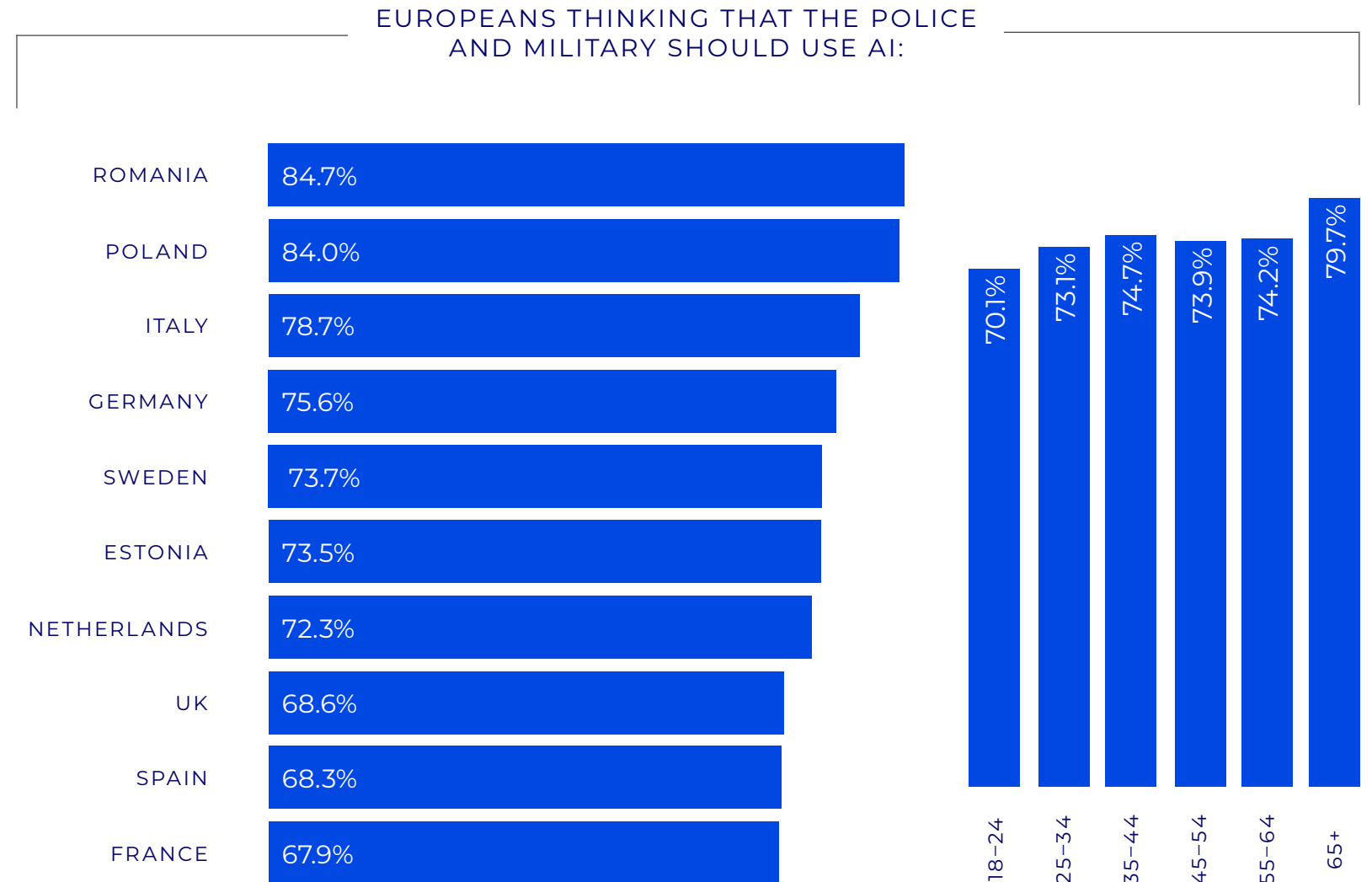
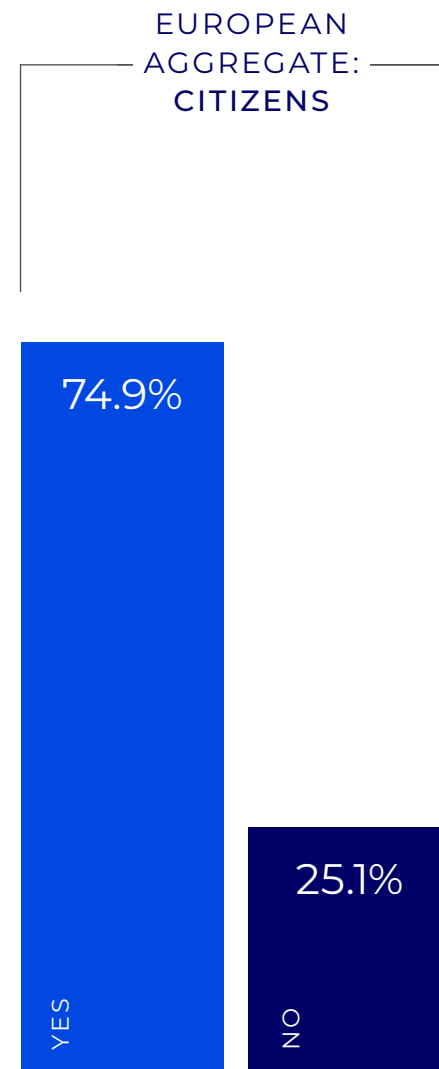
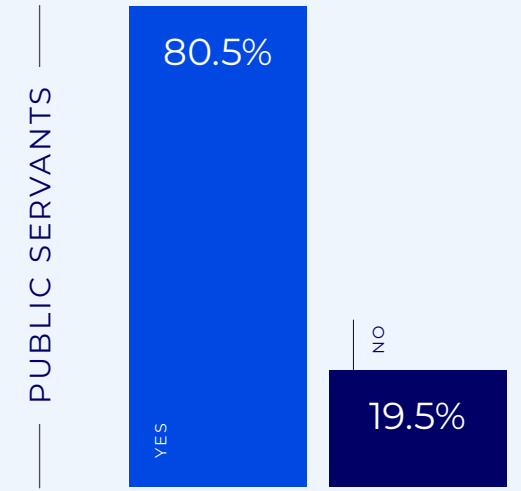
TECH FOR PUBLIC SERVICE DELIVERY

- 74.9% of Europeans support the use of AI for police and military operations.
- Similarly, 80.5% of public servants believe that the police and the military should use AI.
- The highest opposition is seen in Spain and France, where 31.7% (Spain) and 32.1 (France) of respondents are against it, followed closely by 31.4% in the UK.
- Support for using AI in the police and the military increases with age, with a nearly 10-point difference between respondents under 25 and those over 65.



QUESTION: Do you think the police and the military should use AI to support their operations (e.g. using facial recognition and biometric data for surveillance)?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

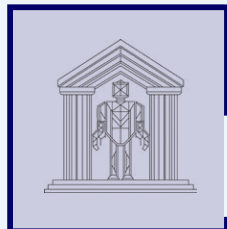
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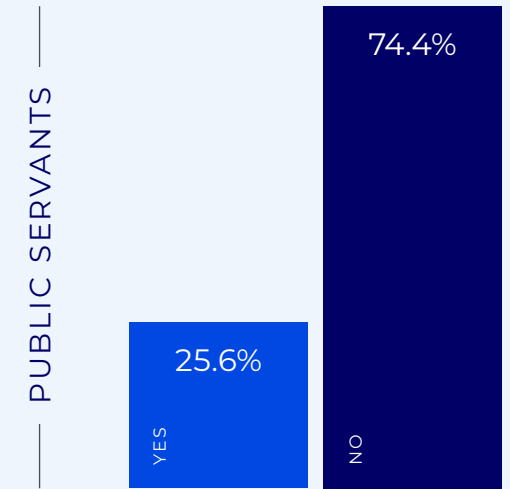
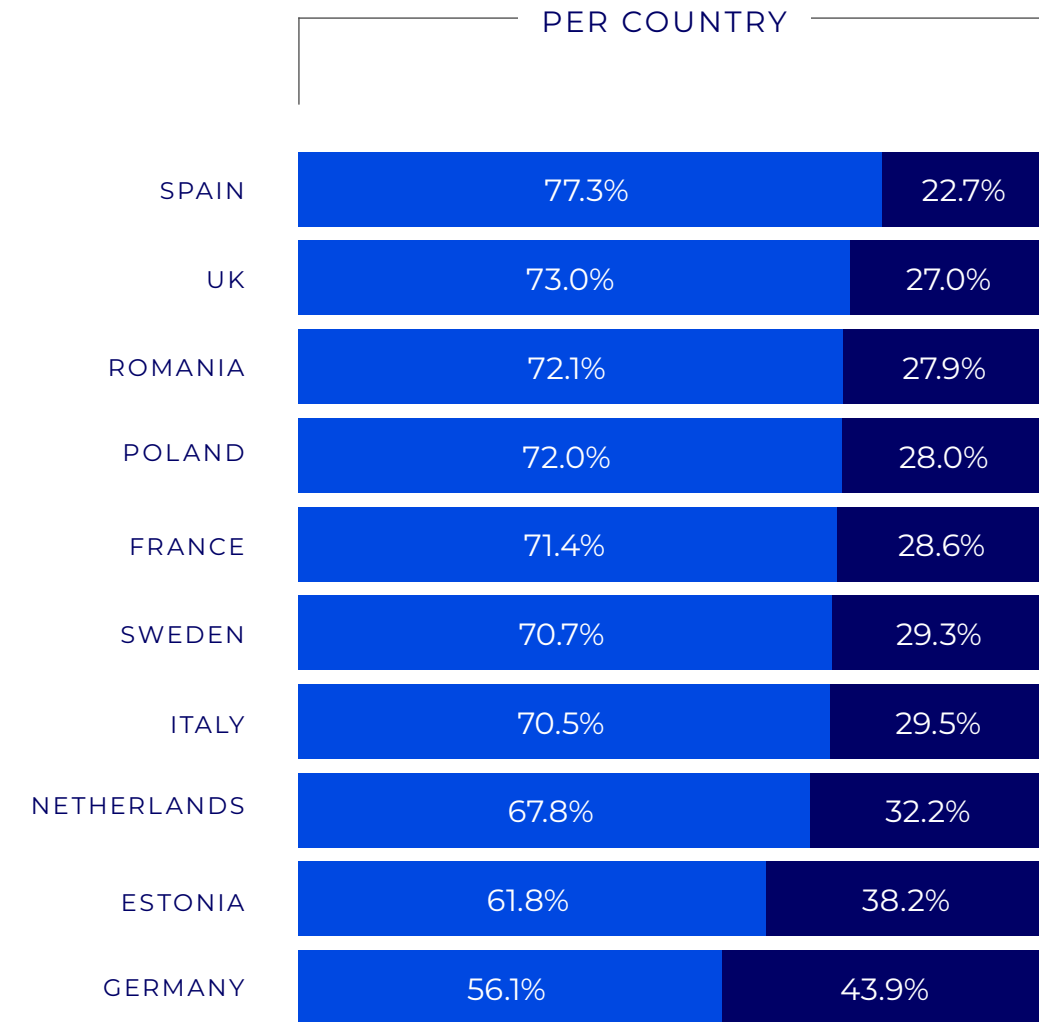
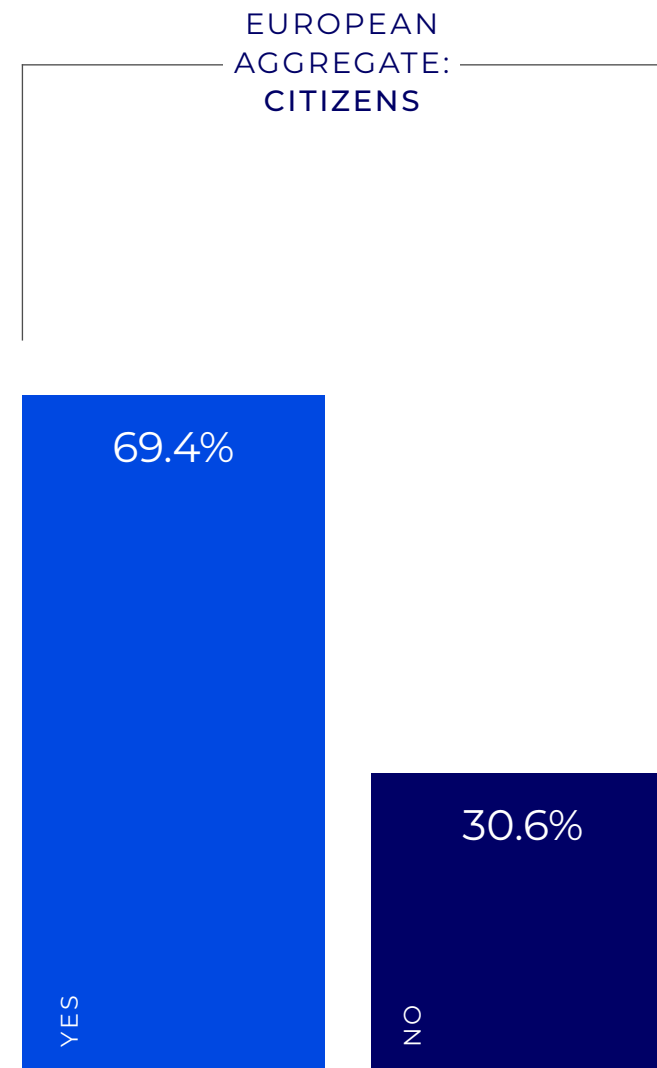
TECH FOR PUBLIC SERVICE DELIVERY

- In line with previous years, 69.4% of European citizens favor enacting laws to limit automation in order to preserve jobs.
- Highest support to these laws is shown in Spain (77.3%) and in the UK (73.0%).
- However, 74.4% of public servants oppose such laws.



QUESTION: Should UK and EU governments limit automation by law in order to save jobs and prevent technological unemployment?

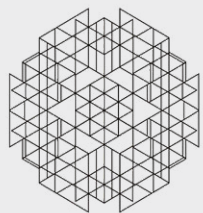
■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

3

**DIGITAL READINESS
FOR GOVERNMENTS**



#11

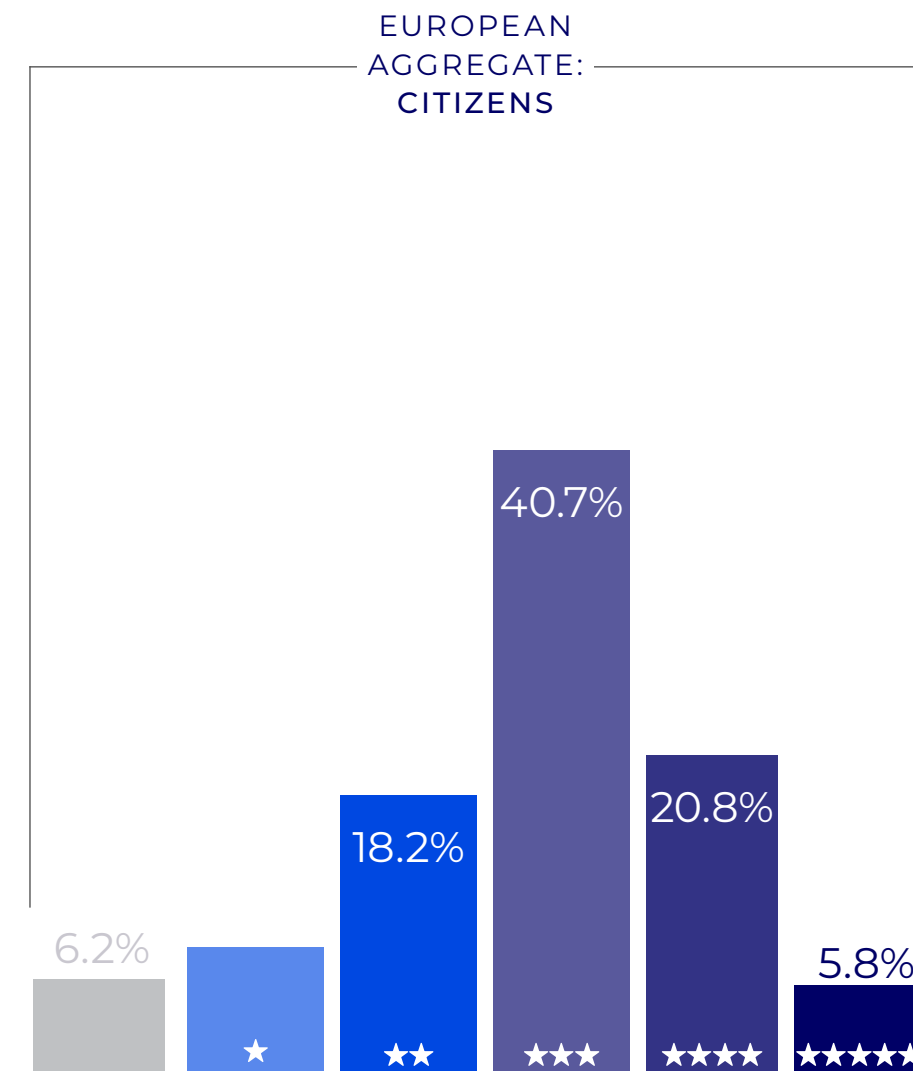
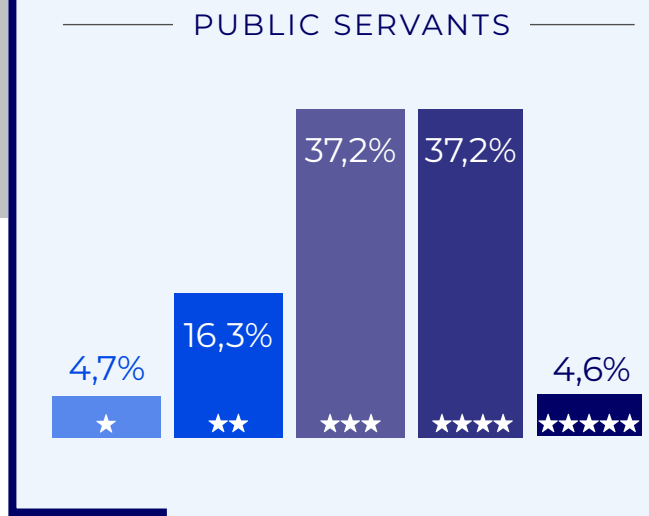


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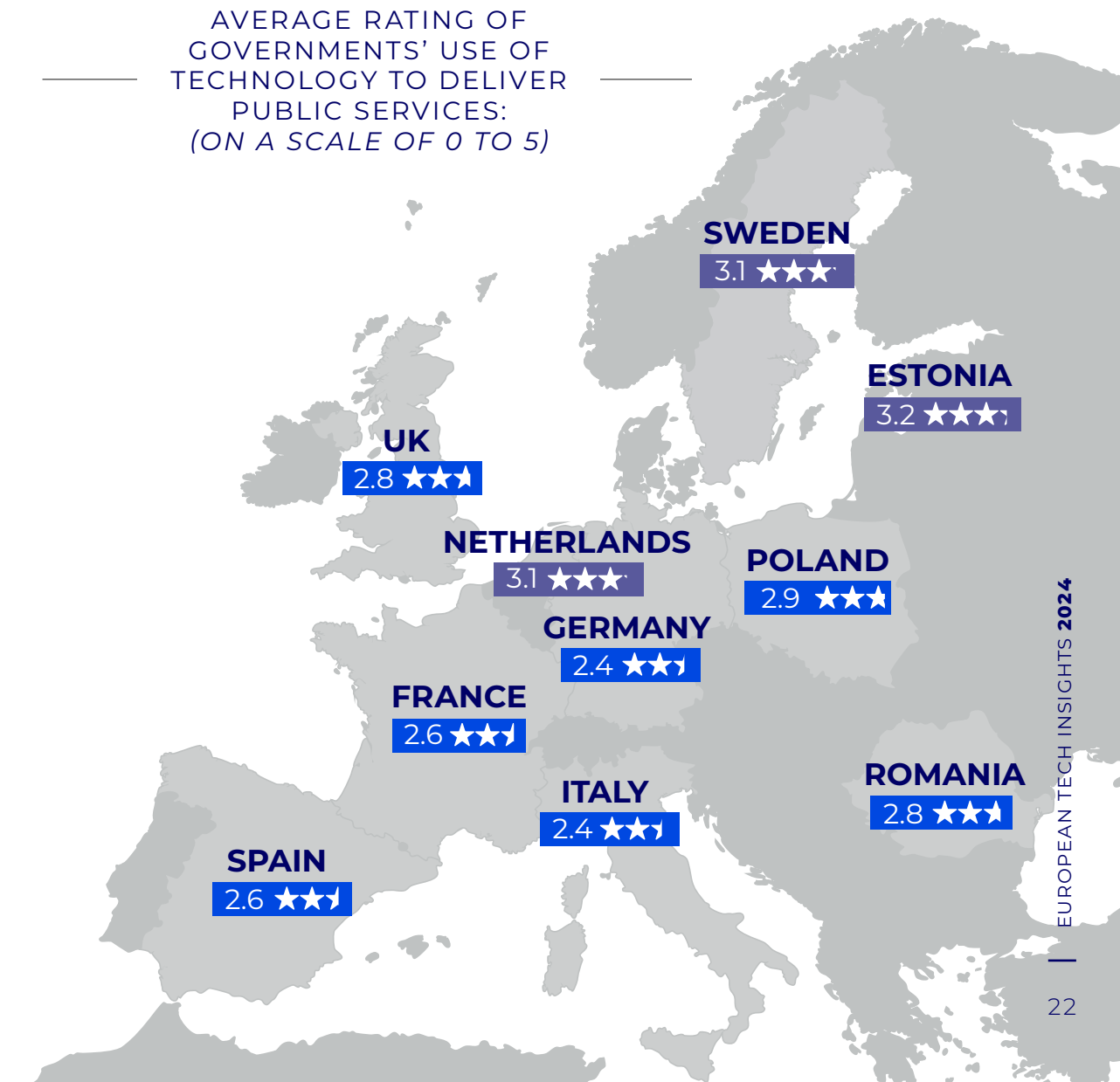
DIGITAL READINESS FOR GOVERNMENTS

- Citizens approve of the government's efforts to use technology for improving public service delivery, rating it at an average of 2.8 out of 5, while public servants provide a slightly higher rating of 3.2 out of 5.
- The perception of these efforts is most favorable in Estonia (3.2), Sweden (3.1), and the Netherlands (3.1).

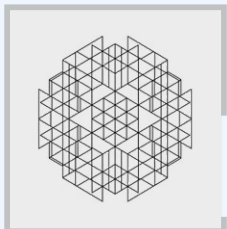
QUESTION: How would you assess your government's efforts in using technology to improve the delivery of public services?



AVERAGE RATING OF GOVERNMENTS' USE OF TECHNOLOGY TO DELIVER PUBLIC SERVICES: (ON A SCALE OF 0 TO 5)



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



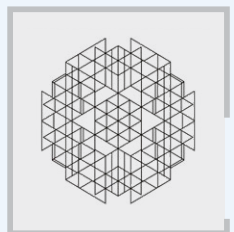
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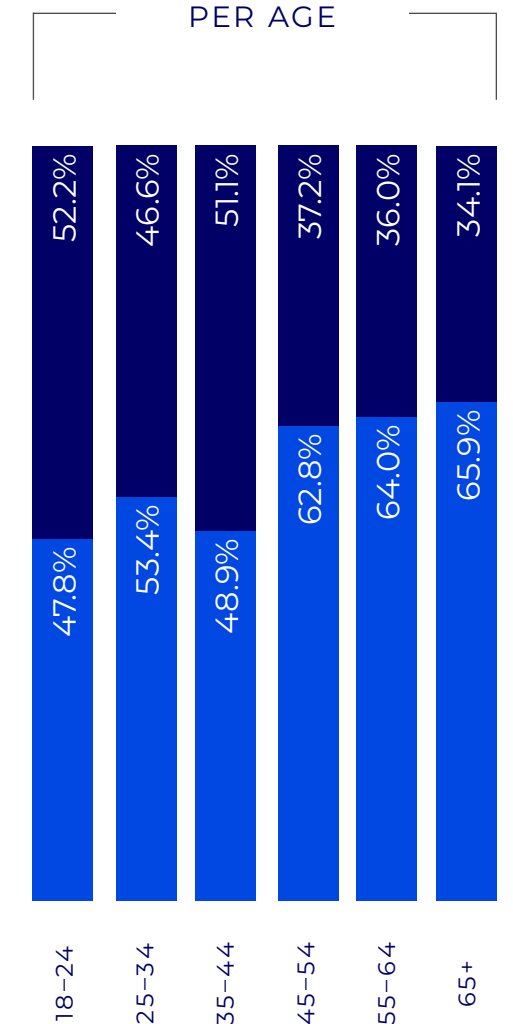
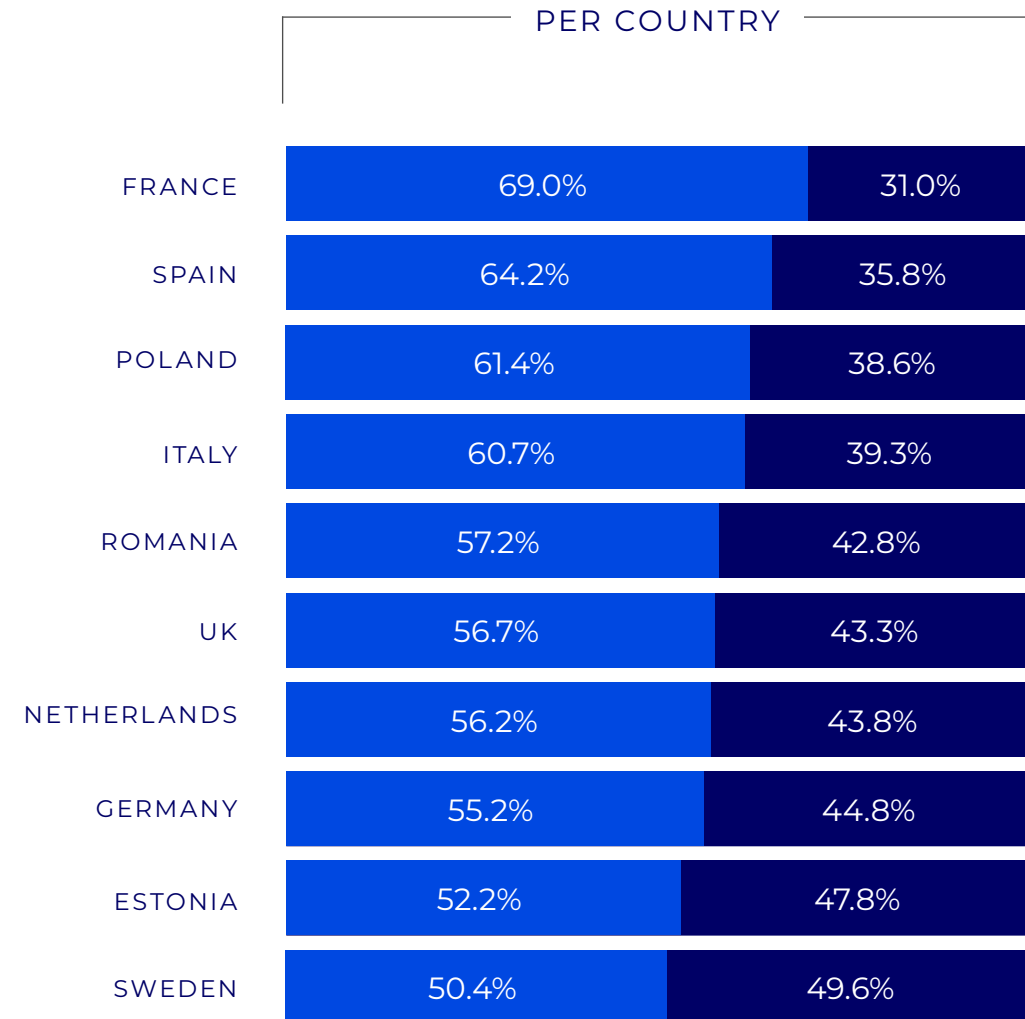
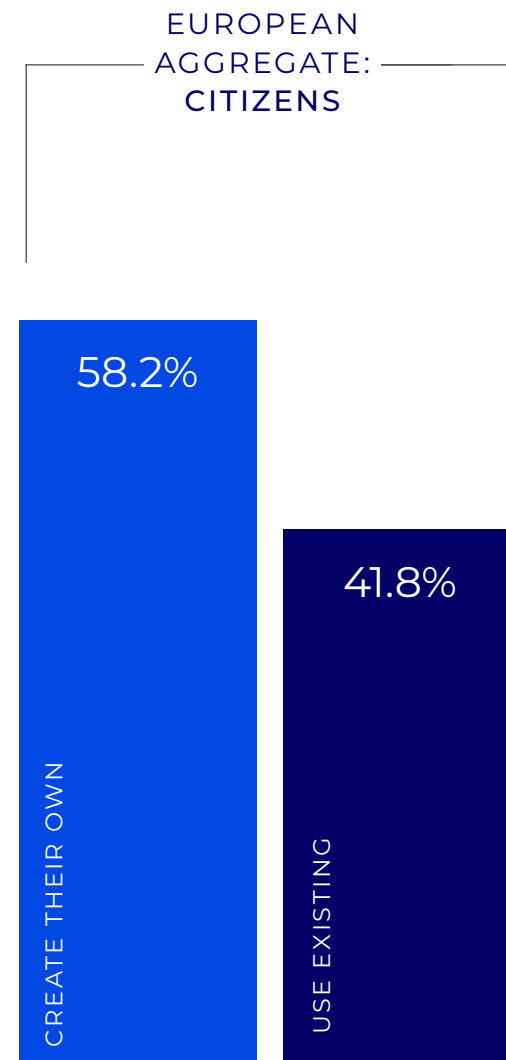
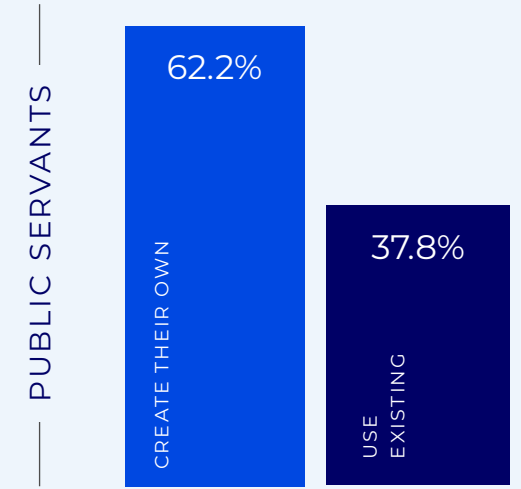
DIGITAL READINESS FOR GOVERNMENTS

- Most citizens (58.2%) support the idea of their governments developing their own software for public services rather than using existing ones from tech companies, a sentiment echoed by 62.2% of public servants.
- Support for governments developing their own software is strongest in France (69.0%) and Spain (64.2%).
- Younger generations are more inclined to support using existing software than older ones: while a majority (52.2%) of those under 25 favor existing options, two-thirds (65.9%) of those aged 65 and older prefer governments to develop their own software.



QUESTION: Should governments develop their own software programs to deliver public services or use existing ones from technology companies (e.g., Google, Microsoft)?

■ CREATE THEIR OWN SOFTWARE
■ USE EXISTING SOFTWARE FROM COMPANIES



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

#13

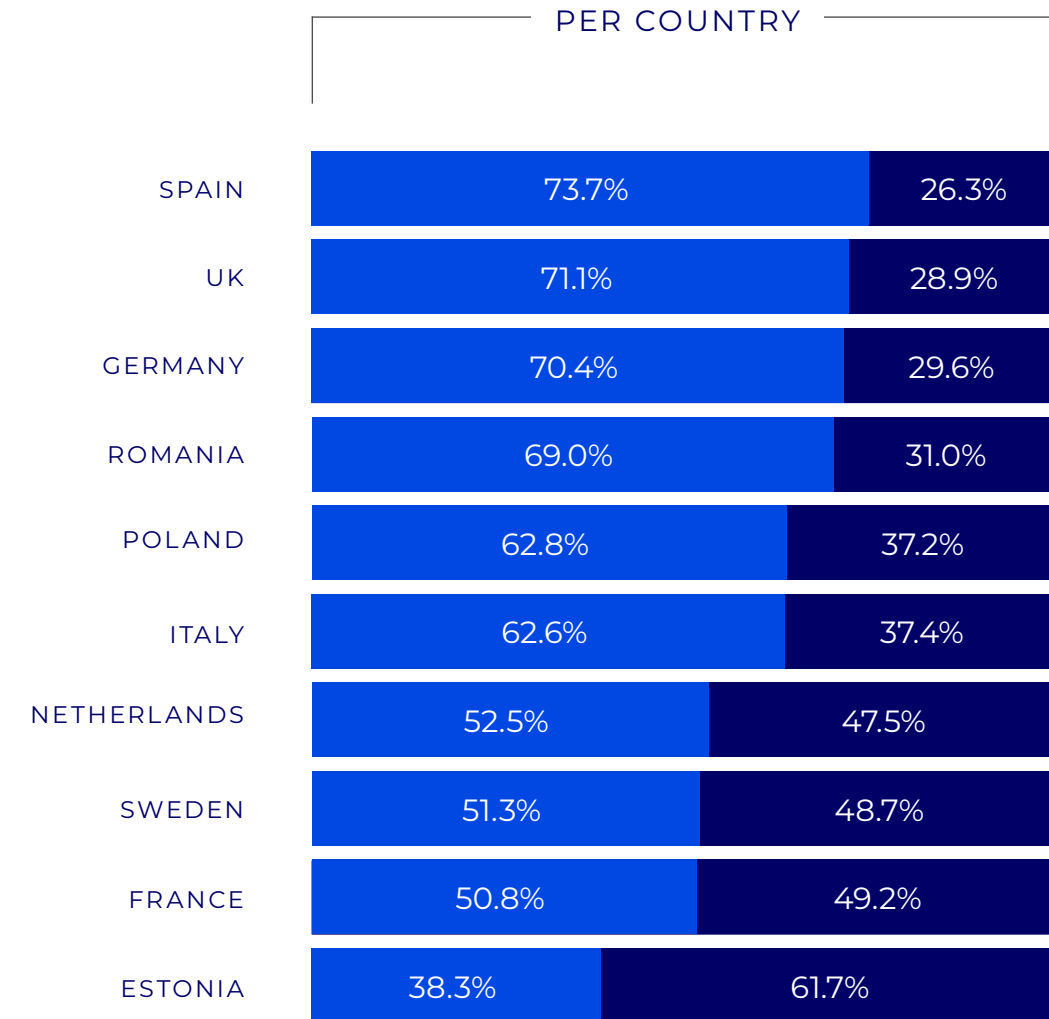
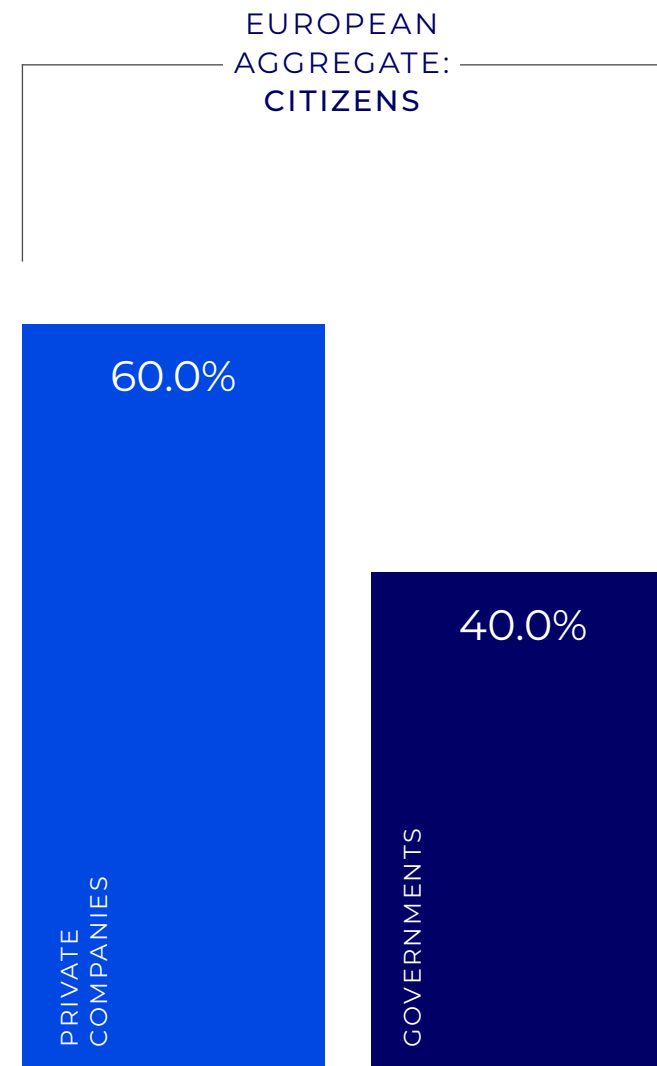
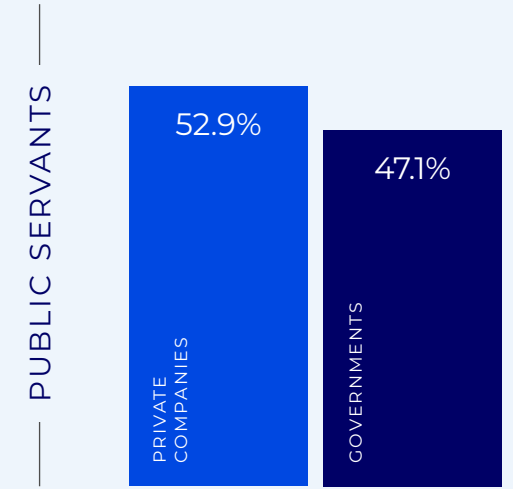


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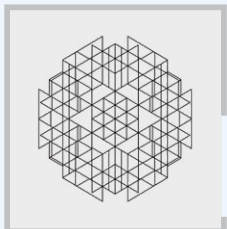
DIGITAL READINESS FOR GOVERNMENTS

- In most countries, there is a consensus that private companies are better prepared against cyberattacks, with a European average of 60.0% holding this opinion.
- Estonia is the only country in which citizens believe their government is more prepared for cyber threats (61.7%) than companies (38.3%).
- Public servants have mixed opinions, slightly favoring private companies (52.9%) over government readiness.

QUESTION: In your opinion, who do you believe is better prepared against cyberattacks?



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



#14



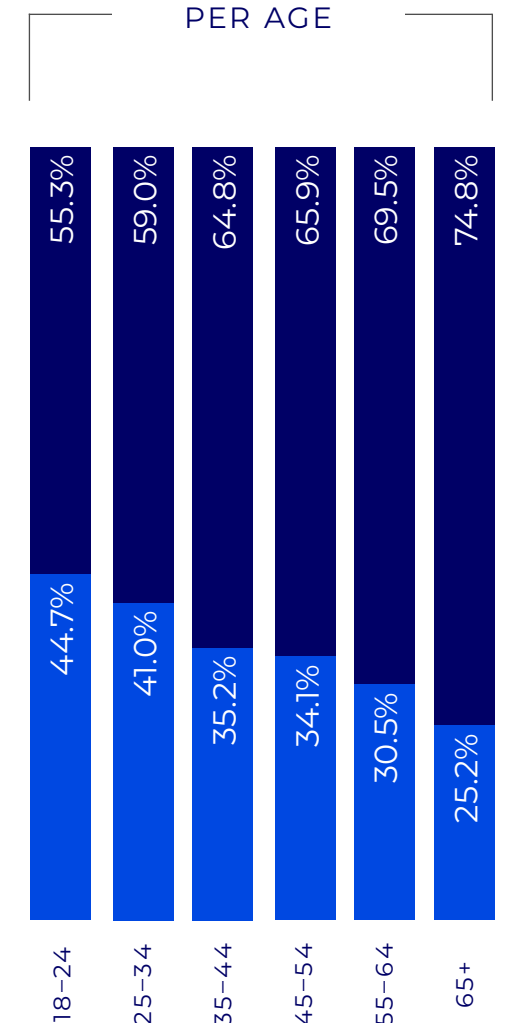
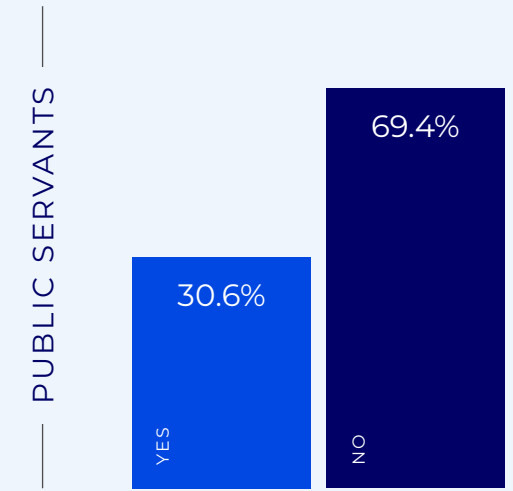
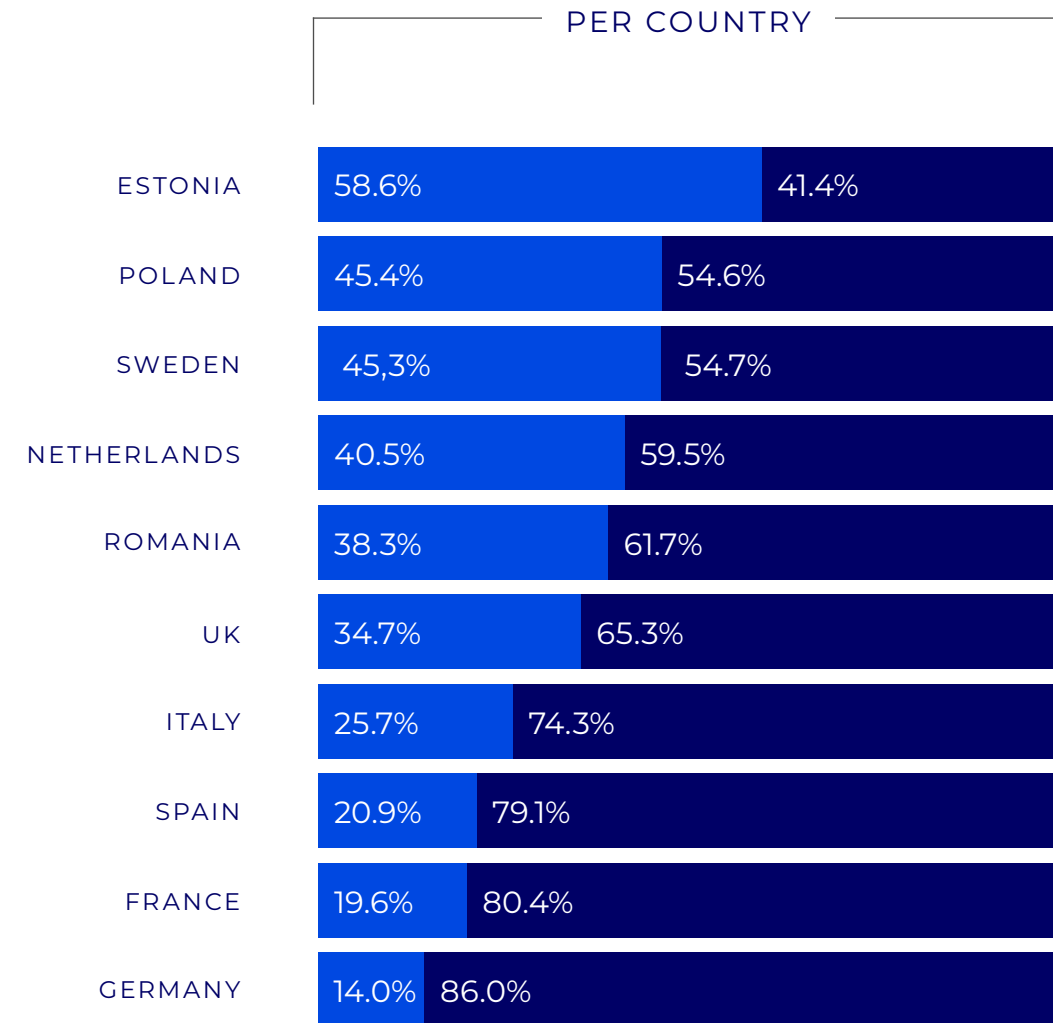
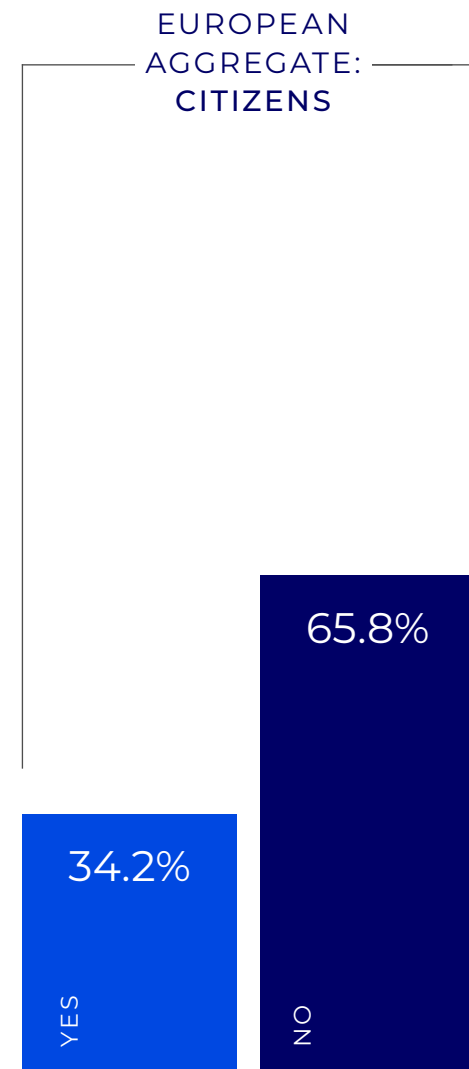
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DIGITAL READINESS FOR GOVERNMENTS

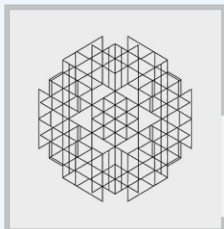
- Two thirds of citizens (65.8%) believe that European governments are not moving fast enough to stay competitive. Public servants share this view, with 69.4% believing European governments are moving too slowly.
- In contrast, 58.6% of Estonians feel that government digitalization is progressing adequately.
- Young Europeans are more optimistic: nearly twice as many believe that governments are moving fast enough compared to those over 65.

QUESTION: In your opinion, compared to China and America, European Governments are moving fast enough with the digitalization of government to stay competitive?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.



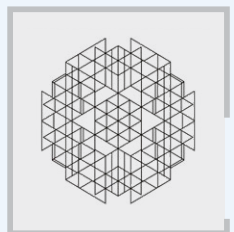
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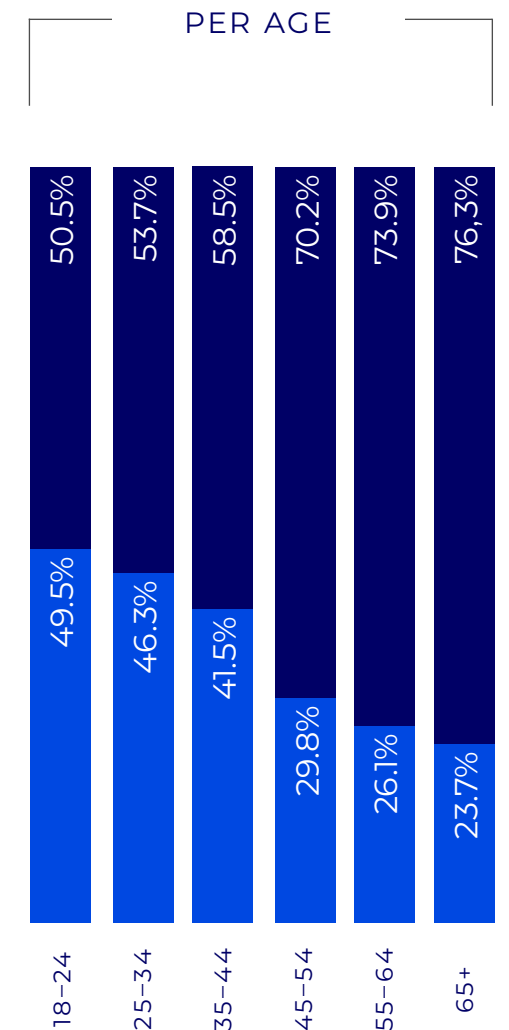
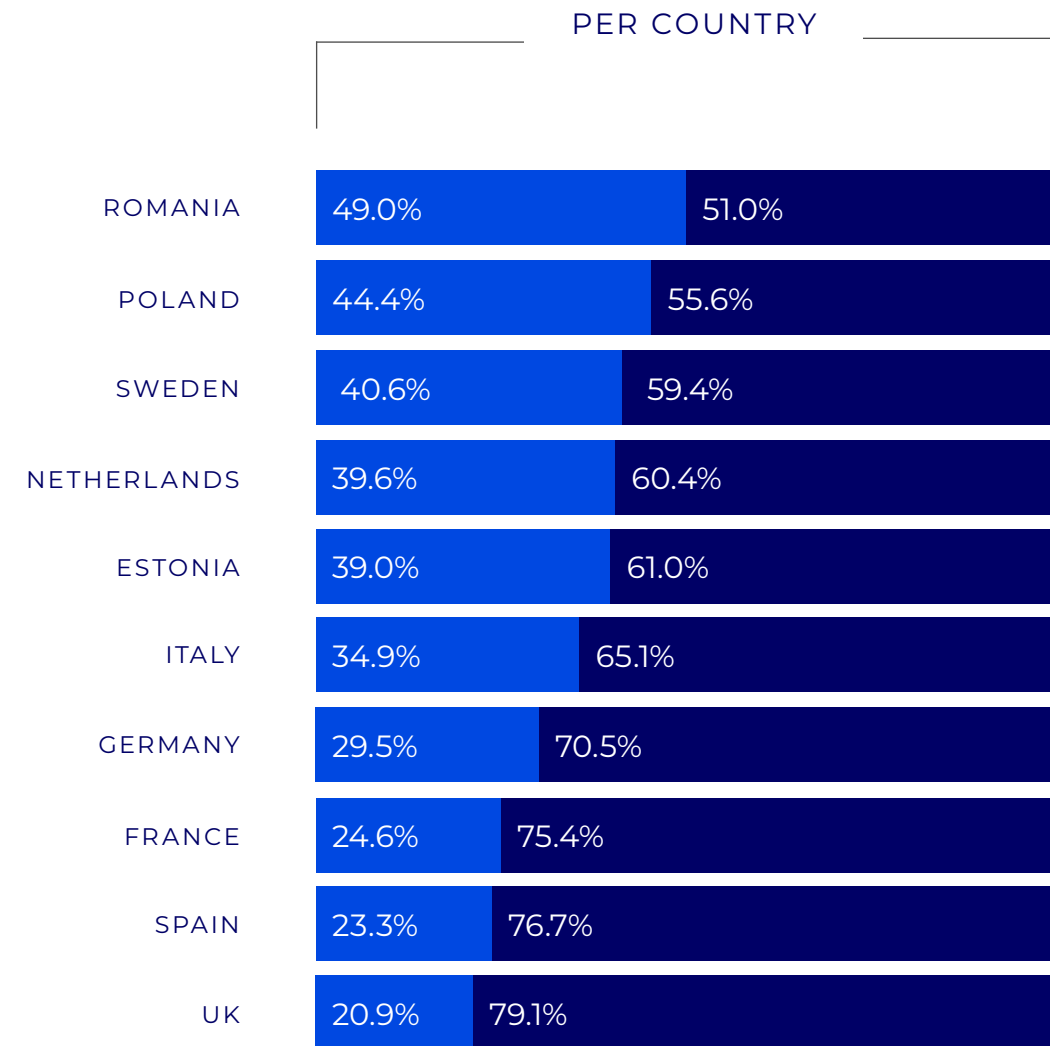
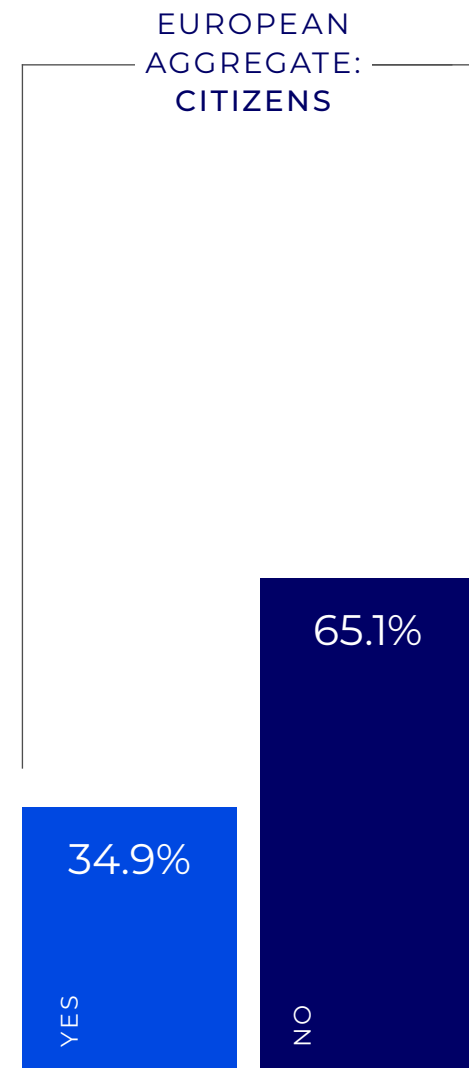
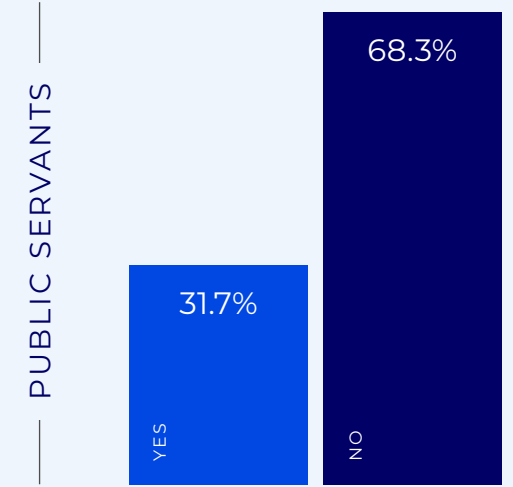
DIGITAL READINESS FOR GOVERNMENTS

- More than a third (34.9%) of European citizens and 31.7% of public servants would trust the accuracy of AI tools to summarize parliamentary work.
- Half of Europeans aged 18 to 24 would trust these tools, while fewer than a quarter of those aged 65 and older would.
- Lowest levels of trust on these AI tools are seen in the United Kingdom (79.1% against), Spain (76.7%) and France (75.4%).



QUESTION: There are now AI tools (like ChatGPT) that summarize legislative debates to make it easier to understand parliamentary work. Would you trust the accuracy of these tools?

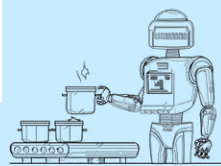
- YES, I WOULD TRUST IT
- NO, I WOULD NOT TRUST IT



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

4

ADOPTION OF EMERGING TECHNOLOGIES



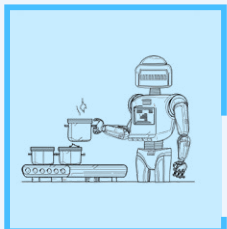
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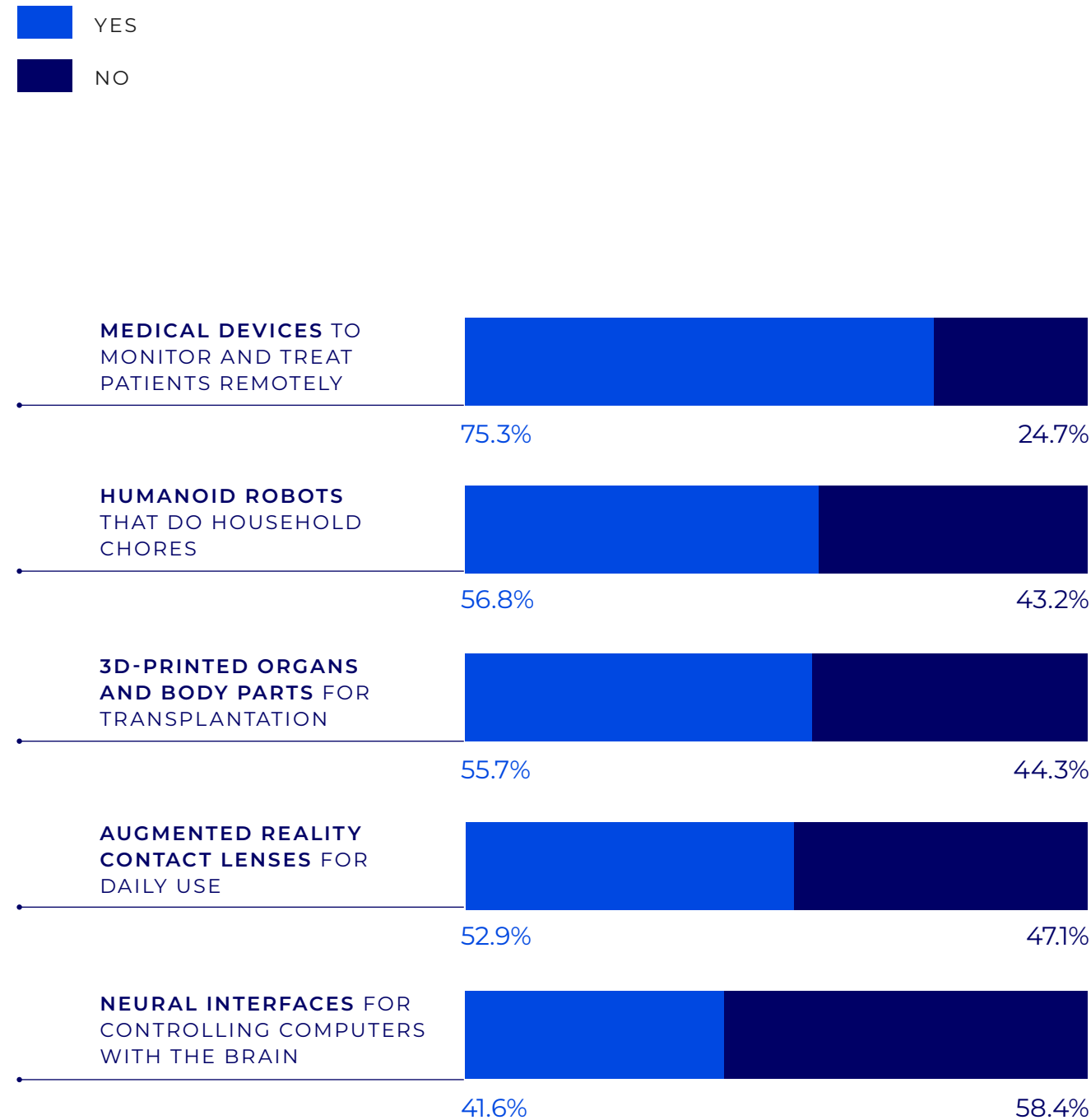
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ADOPTION OF EMERGING TECHNOLOGIES

- A majority of Europeans believe that in the next 10 years they will have access to medical devices that treat patients remotely (75.3%), humanoid robots that do household chores (56.8%), 3D-printed organs (55.7%), and augmented reality contact lenses (52.9%).
- The only technology that Europeans believe will not be available for consumer use within the next ten years is neural interfaces, with only 41.6% of respondents expressing this view.



QUESTION: Which of the following technologies do you think you will have access to within the next 10 years?



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

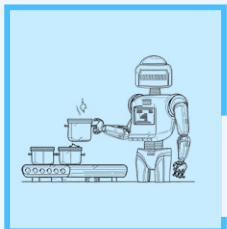
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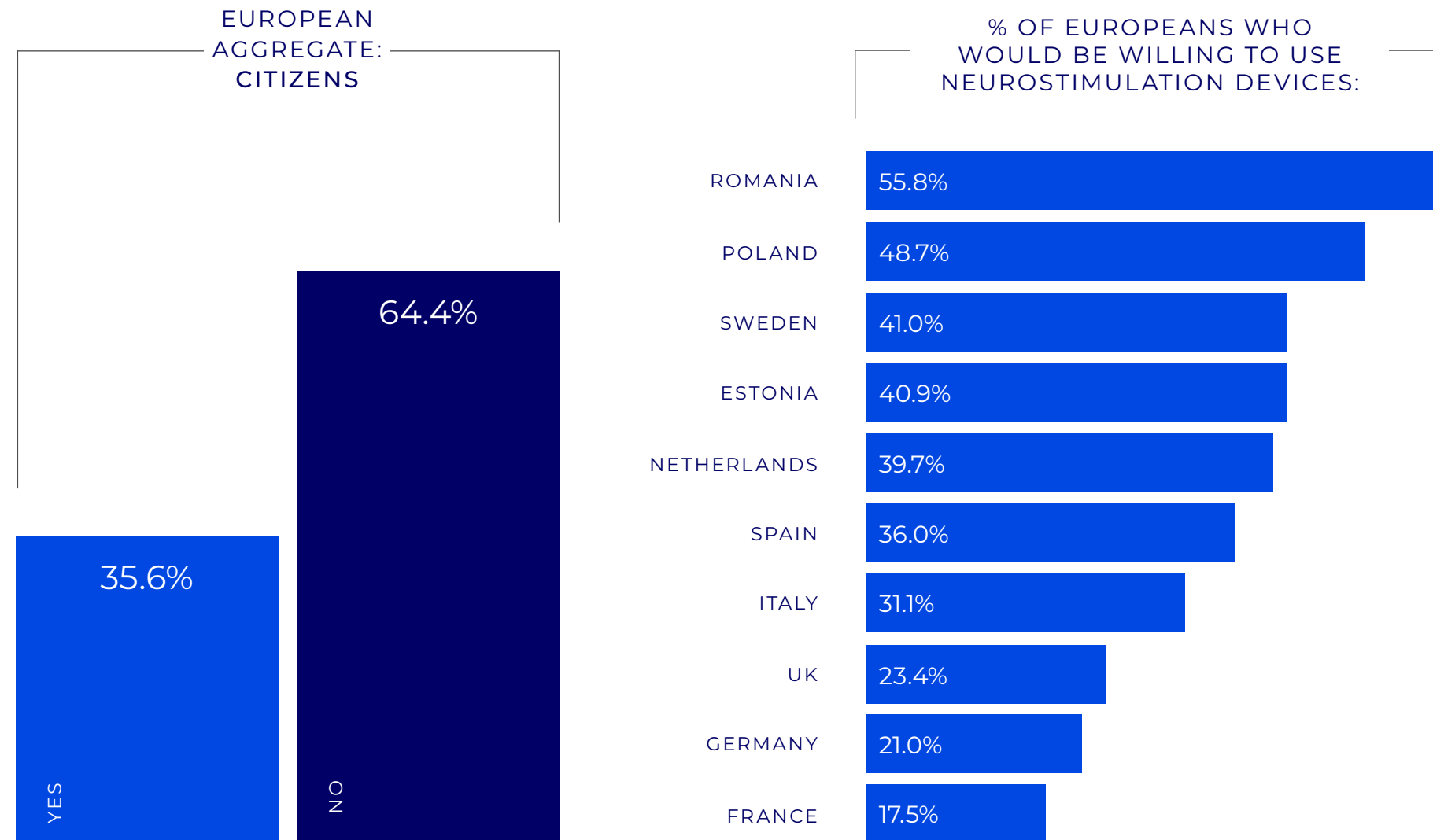
ADOPTION OF EMERGING TECHNOLOGIES

- More than a third (35.6%) of European citizens would be willing to use neurostimulation devices (such as Neuralink) to improve their mood, stress levels, or mental health conditions.
- Romanian (55.8%) and Polish citizens (48.7%) are the most supportive of using these devices.



QUESTION: Would you be willing to use neurostimulation devices (gadgets that deliver stimulation to the brain) to improve your mood, stress levels or mental health conditions?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

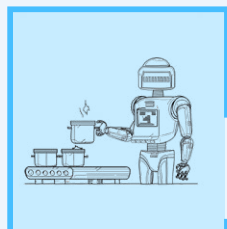
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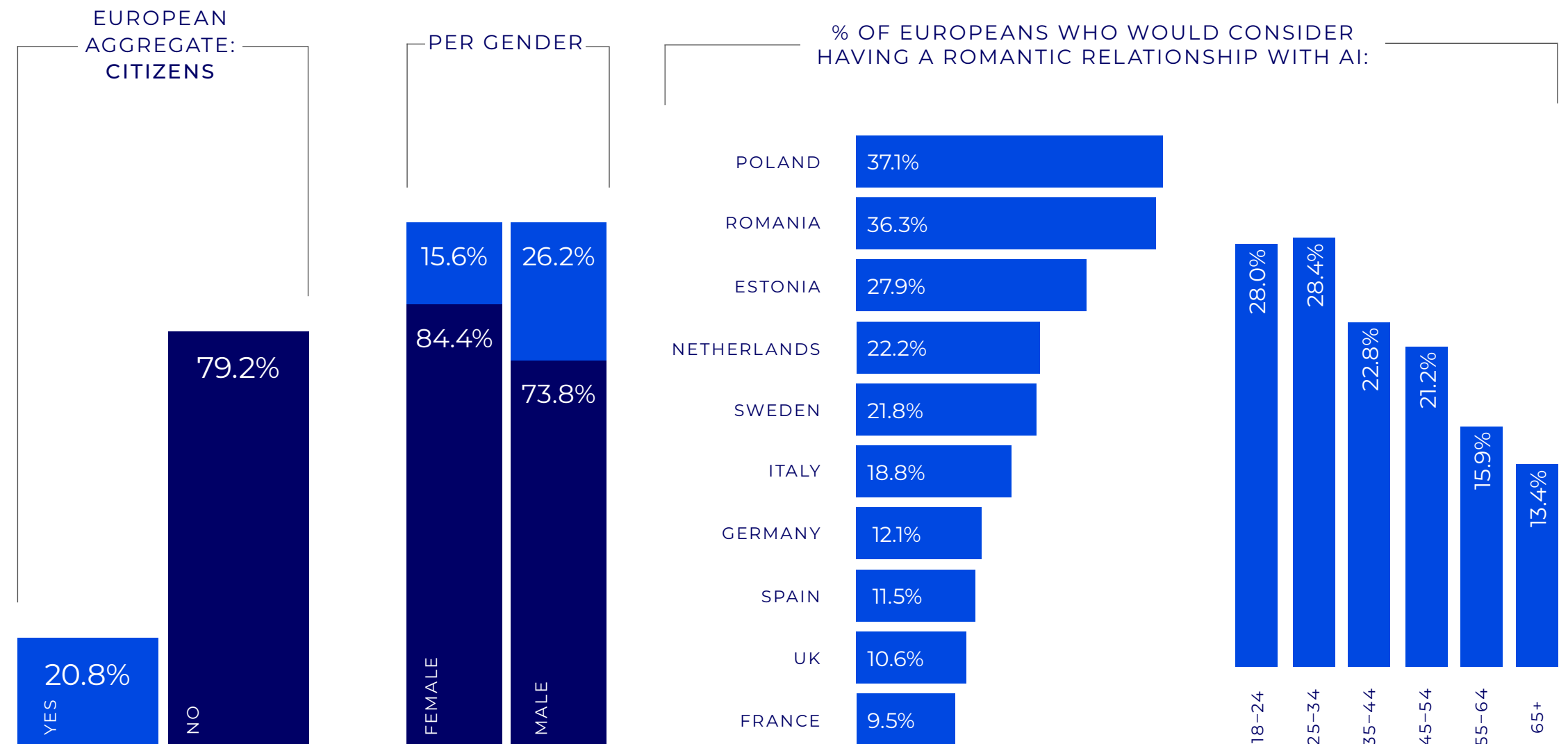
ADOPTION OF EMERGING TECHNOLOGIES

- 26.2% of European males would consider having an AI companion for a romantic relationship.
- Among young people, this percentage rises to 28.0% for both genders.
- Polish (37.1%) and Romanian (36.3%) citizens are the most willing to have an AI romantic companion.



QUESTION: Would you consider having an AI companion capable of conversation, providing companionship, and potentially forming a 'romantic' relationship, similar to those depicted in movies?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

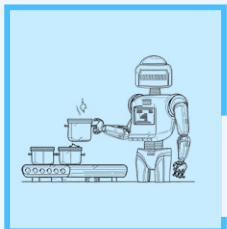
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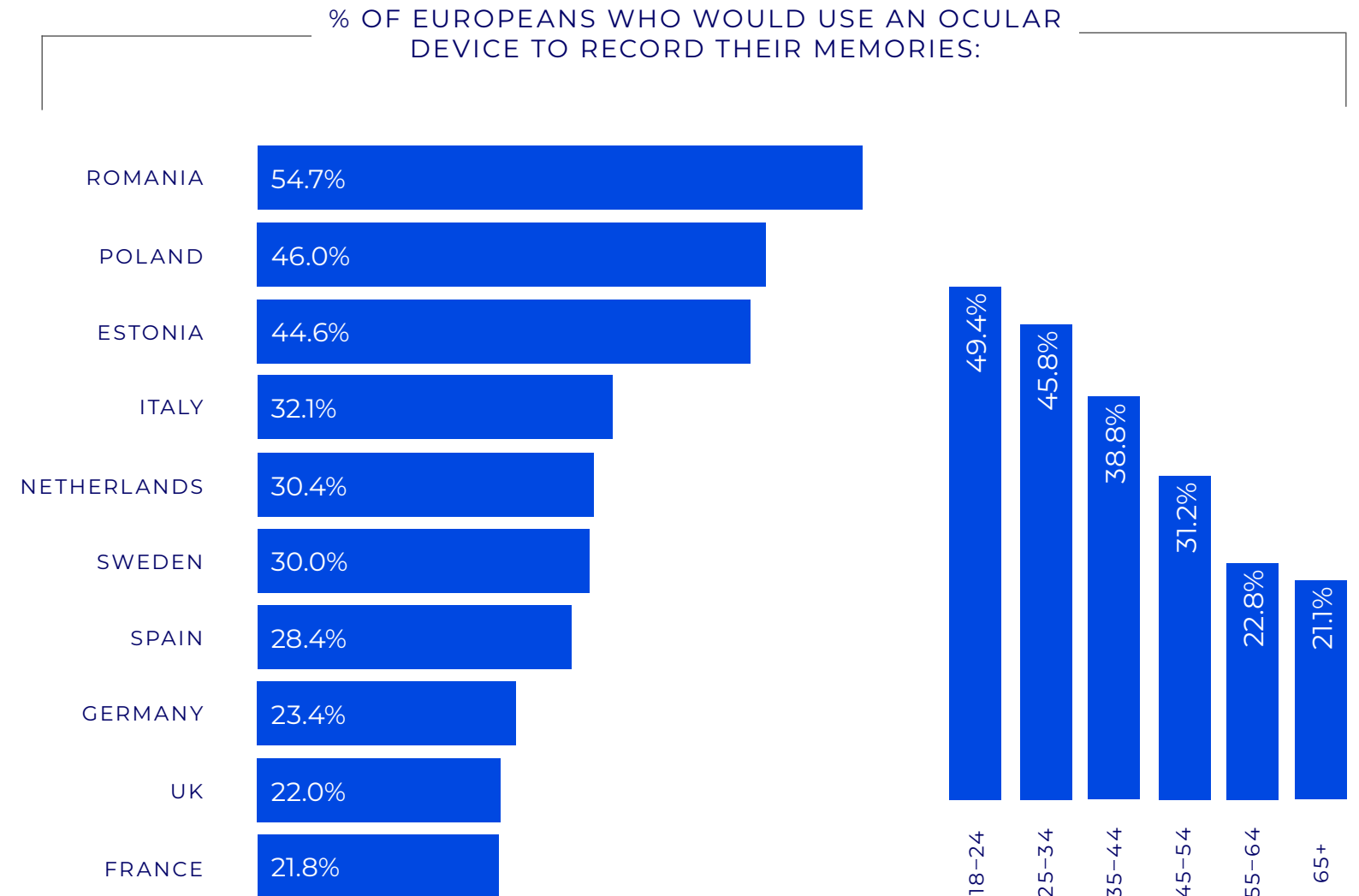
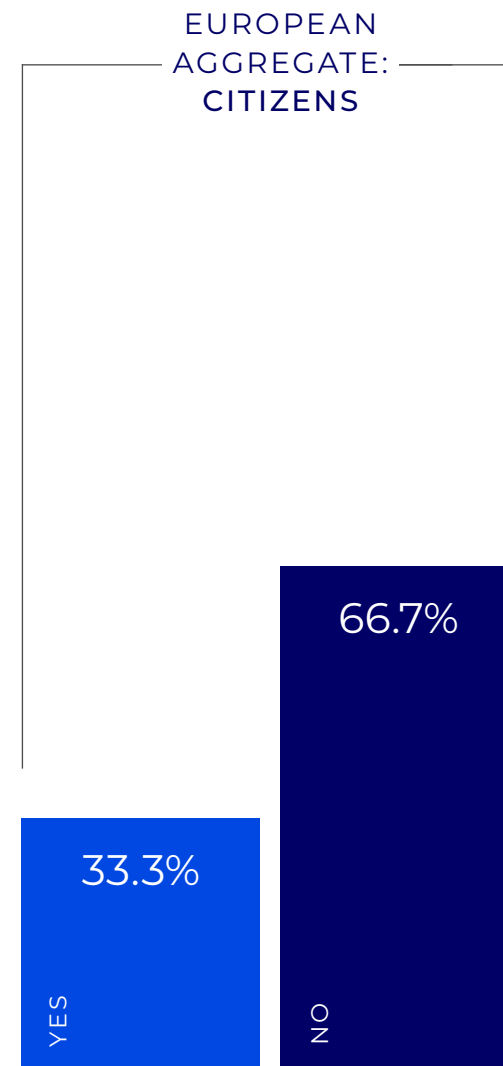
ADOPTION OF EMERGING TECHNOLOGIES

- Up to a third (33.3%) of Europeans would be willing to use ocular devices to record their memories.
- Almost half of young Europeans aged 18 to 24 would be willing to use such ocular device.
- Once again, Romanian (54.7%) and Polish (46.0%) citizens are the most receptive to using this technology.



QUESTION: Would you be interested in using an ocular device that records all your experiences and memories, allowing you to replay them at will and the ones you choose from your memory?

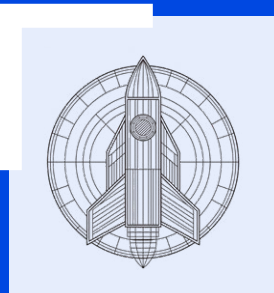
■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

5

THE SPACE RACE



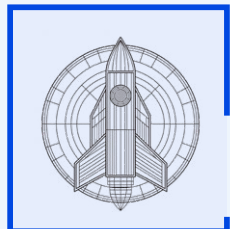
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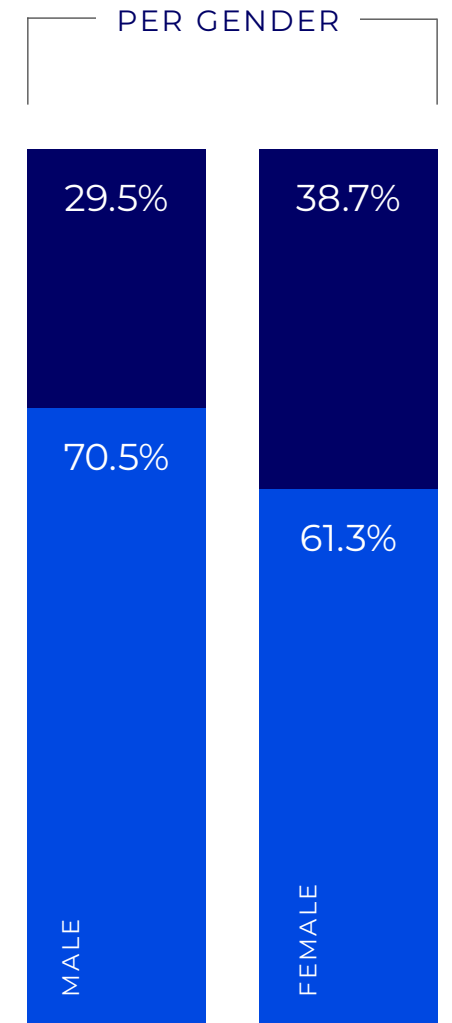
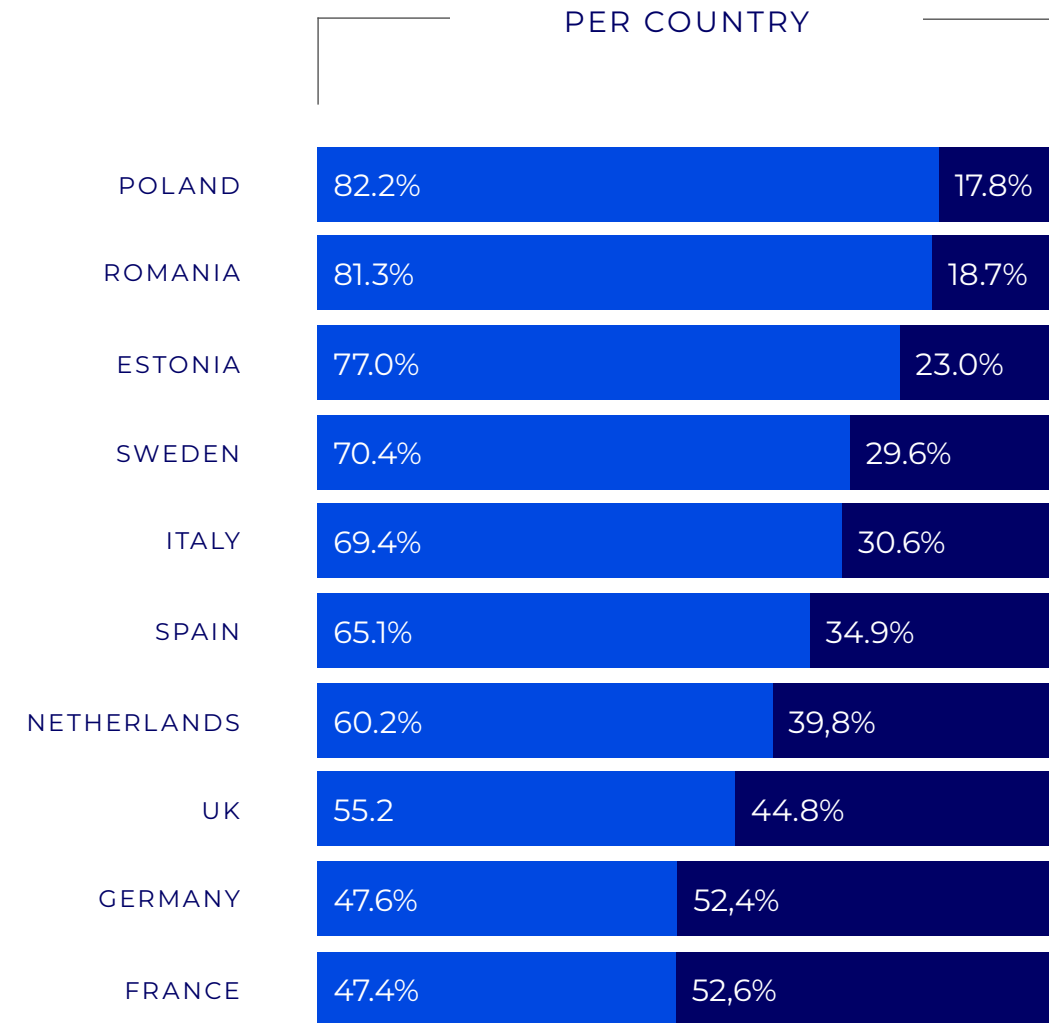
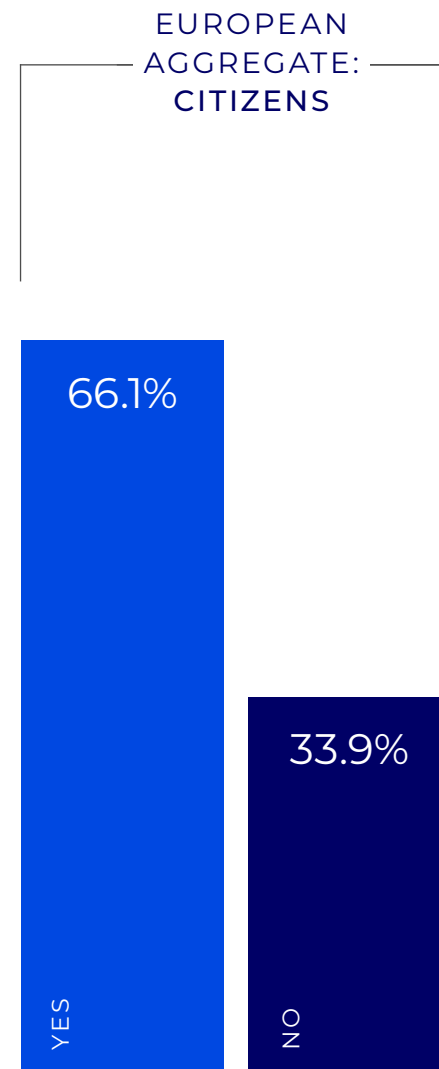
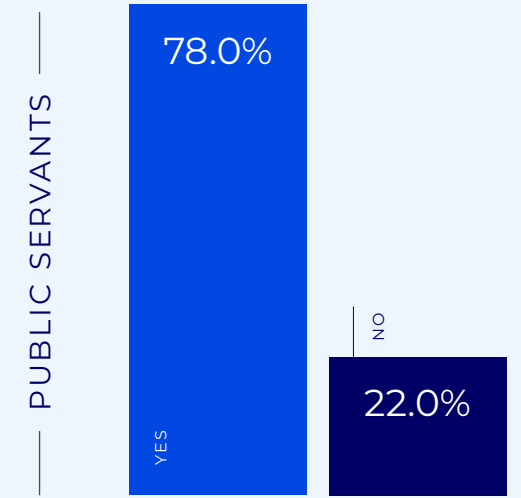
THE SPACE RACE

- 66.1% of citizens and 78.0% of public servants favor public investment in space exploration technologies.
- France and Germany are the only countries in which a slight majority are against it, with 52.6% and 52.4% respectively.
- Males (70.5%) show more support for this government investment than women (61.3%).



QUESTION: Do you support government investment in space exploration technologies?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

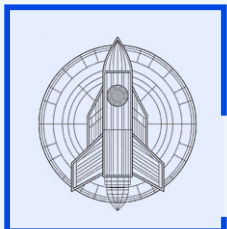
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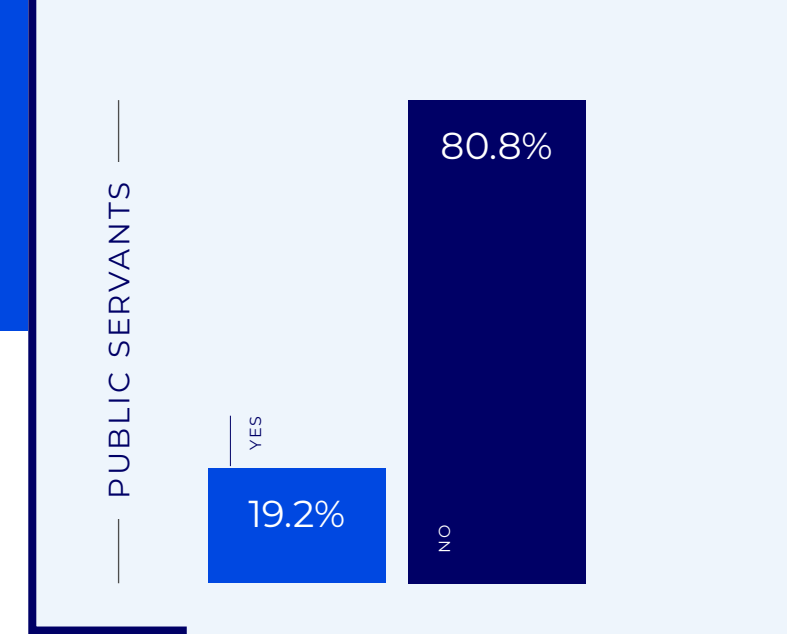
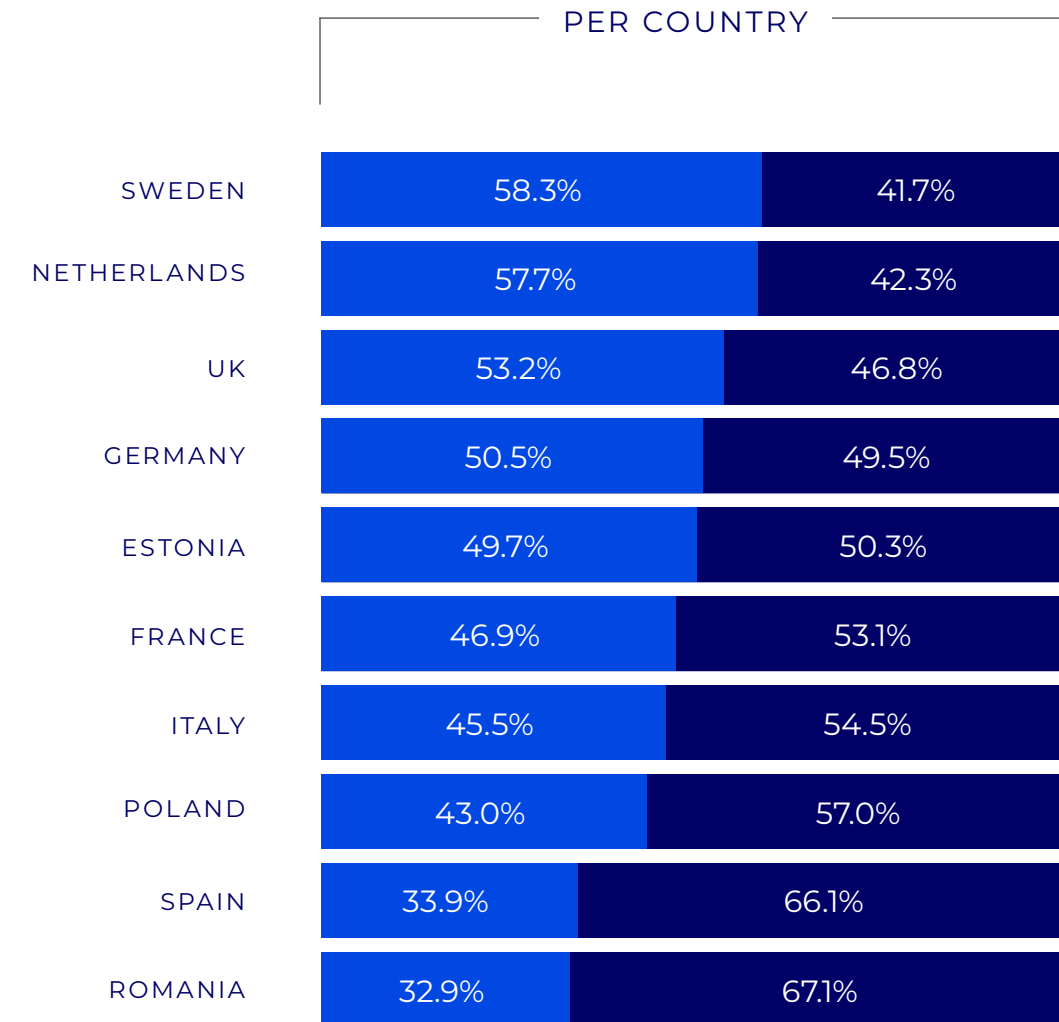
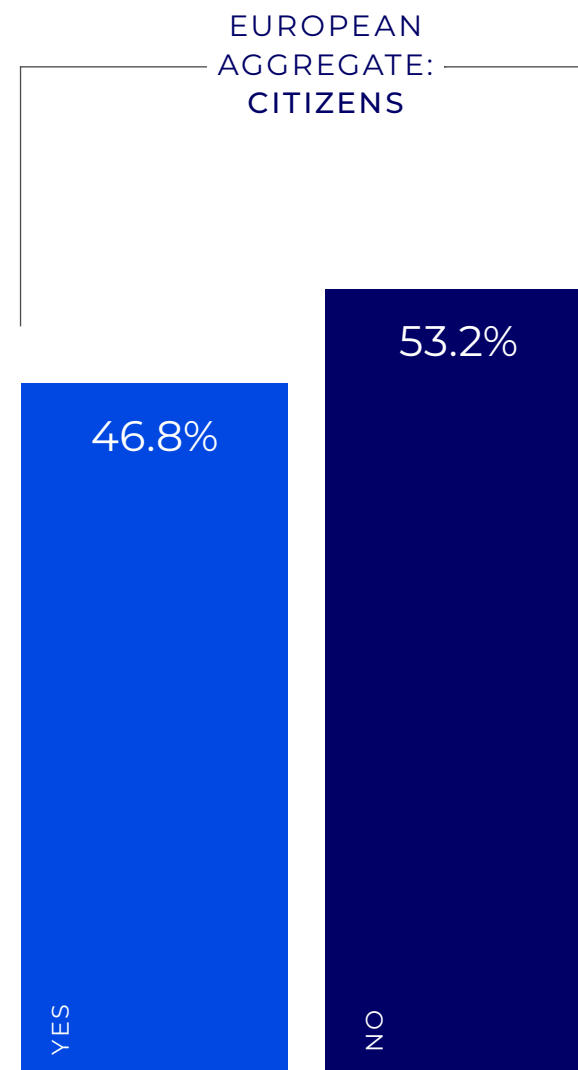
THE SPACE RACE

- A slight majority of Europeans (53.2%) believe that Europe is not investing enough in space exploration.
- This view is also predominant among public servants (80.8%).
- Only three countries believe Europe is keeping pace with its competitors in space investment: Sweden (58.3%), the Netherlands (57.7%) and Germany (50.5%).



QUESTION: In your opinion, is Europe investing enough resources in space exploration compared to other countries?

■ YES
■ NO



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

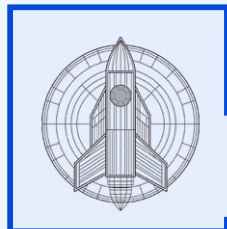
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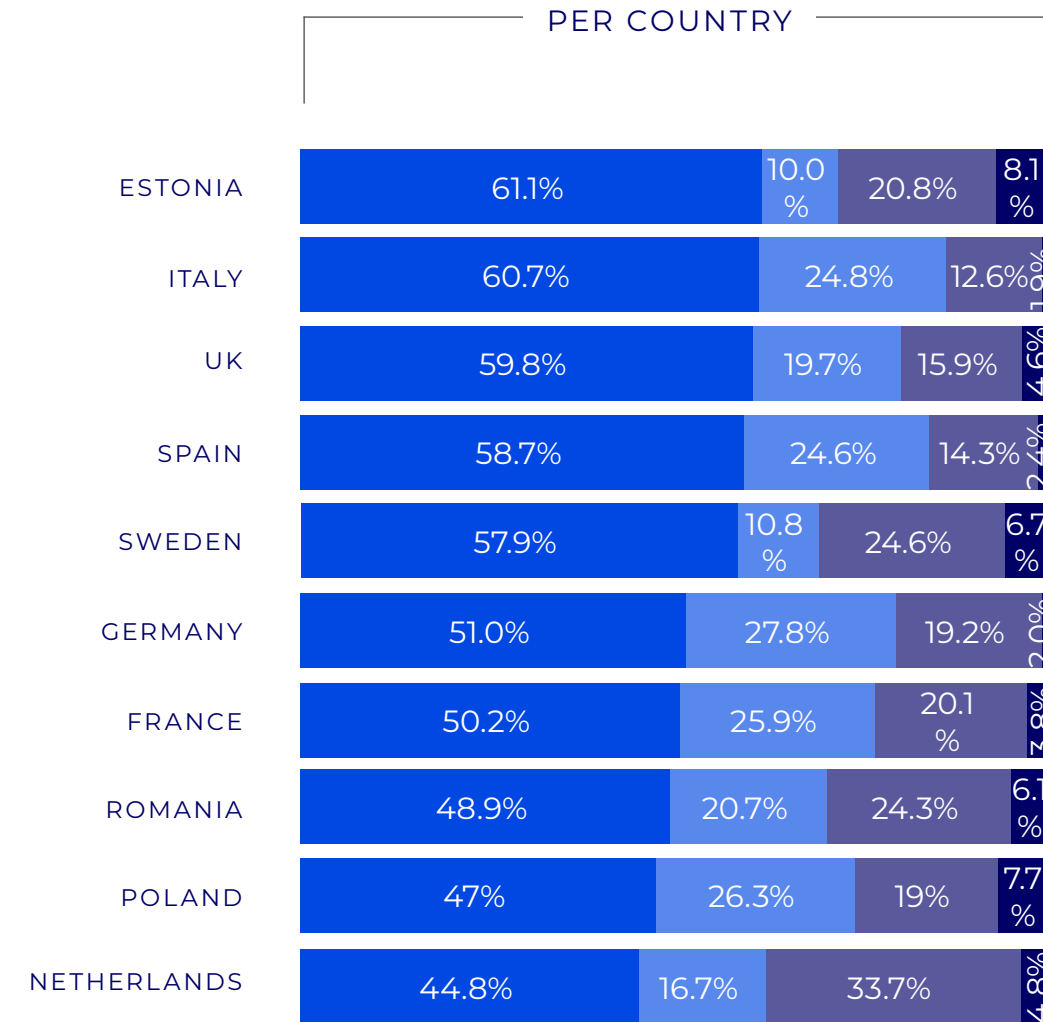
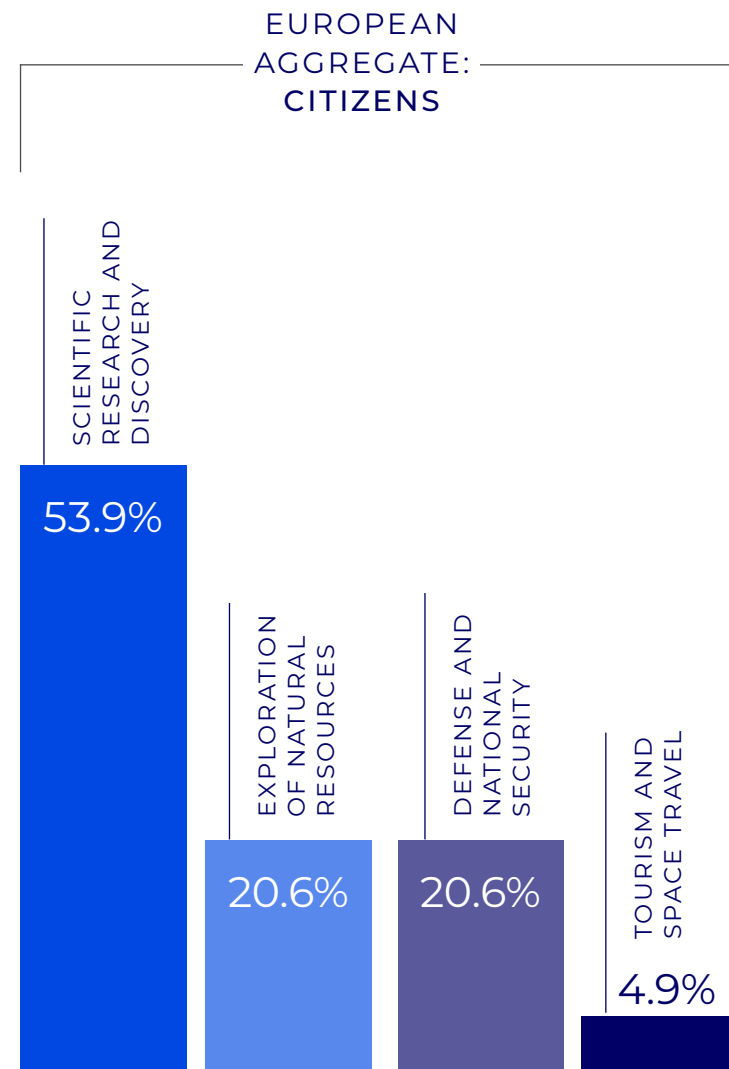
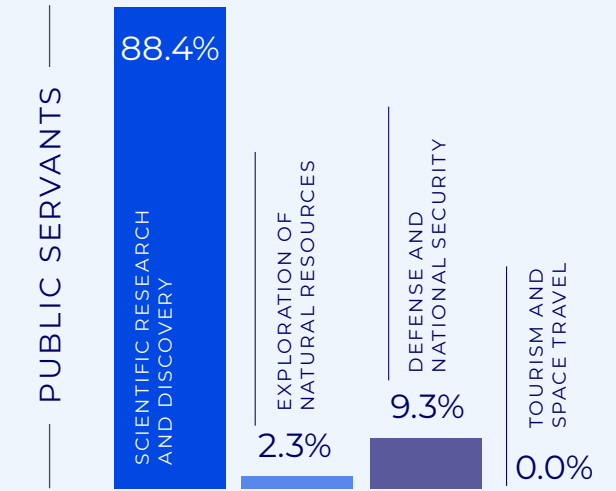
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THE SPACE RACE

- Most European citizens (53.9%) prioritize scientific research and discovery in space, while an overwhelming majority (88.4%) of public servants share this view.
- 20.6% of respondents support focusing on defense and national security, and another 20.6% is in favor of prioritizing natural resource exploration.
- Very few Europeans (4.9%) and no public servants believe tourism and space travel should be a priority.



QUESTION: In your opinion, what should be the primary focus of space exploration today?



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

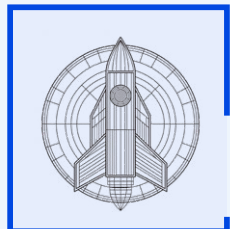
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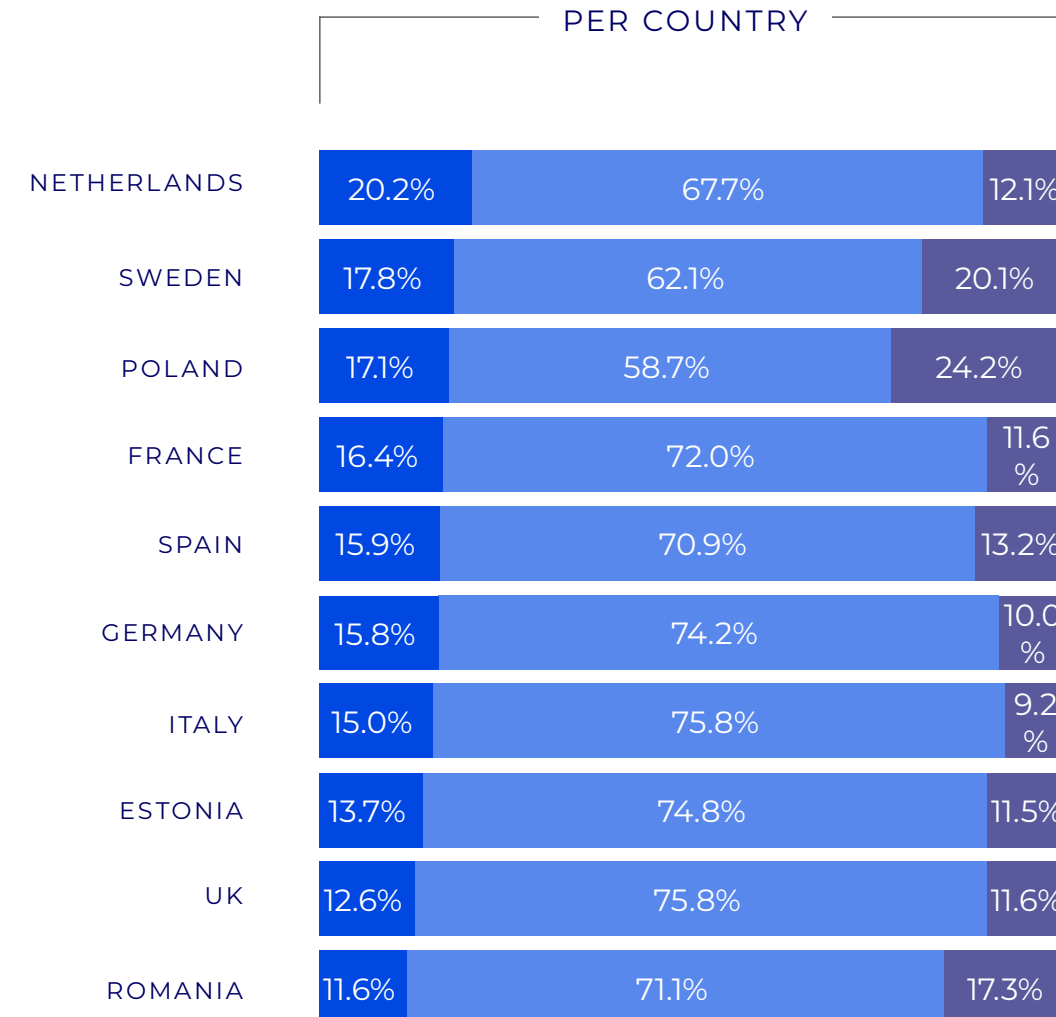
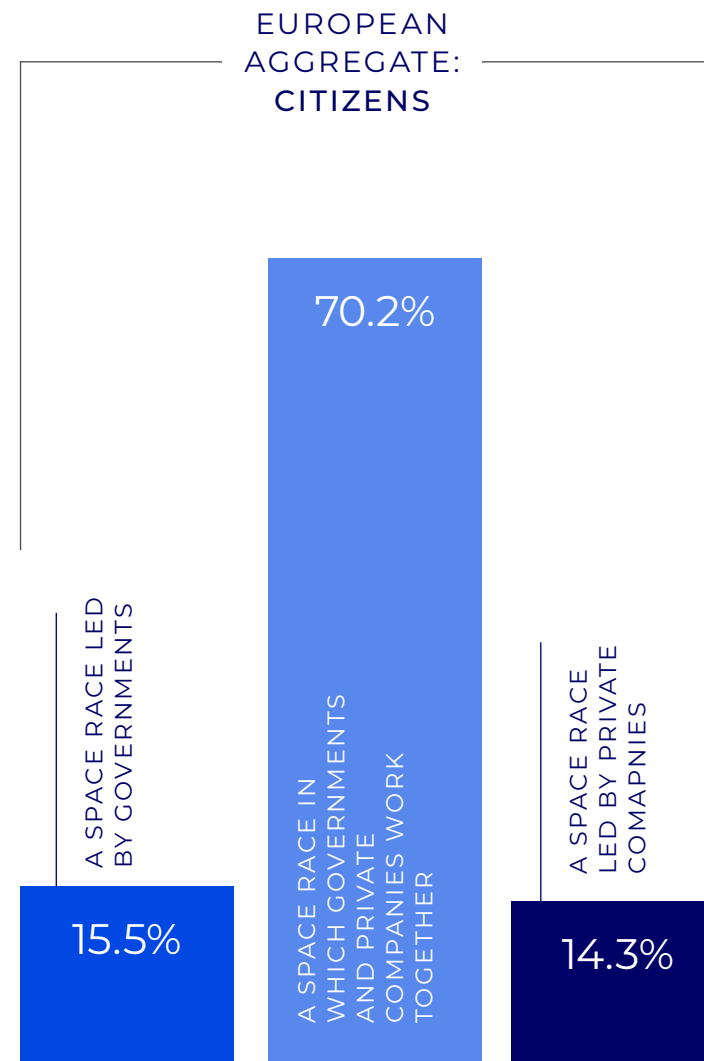
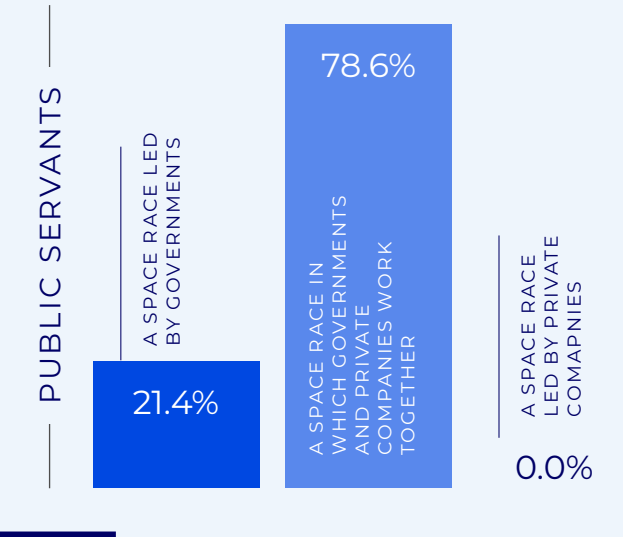
THE SPACE RACE

- **70.2% of Europeans support Public-Private Partnerships in the space race, with the highest support in the United Kingdom and Italy (75.8%), followed by Estonia (74.8%) and Germany (74.2%).**
- **Among public servants, 78.6% support Public-Private space exploration, with no respondents preferring company-only initiatives.**



QUESTION: Which scenario do you prefer for the future of the space race?

- A SPACE RACE LED BY GOVERNMENTS
- A SPACE RACE IN WHICH GOVERNMENTS AND PRIVATE COMPANIES WORK TOGETHER
- A SPACE RACE LED BY PRIVATE COMPANIES



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

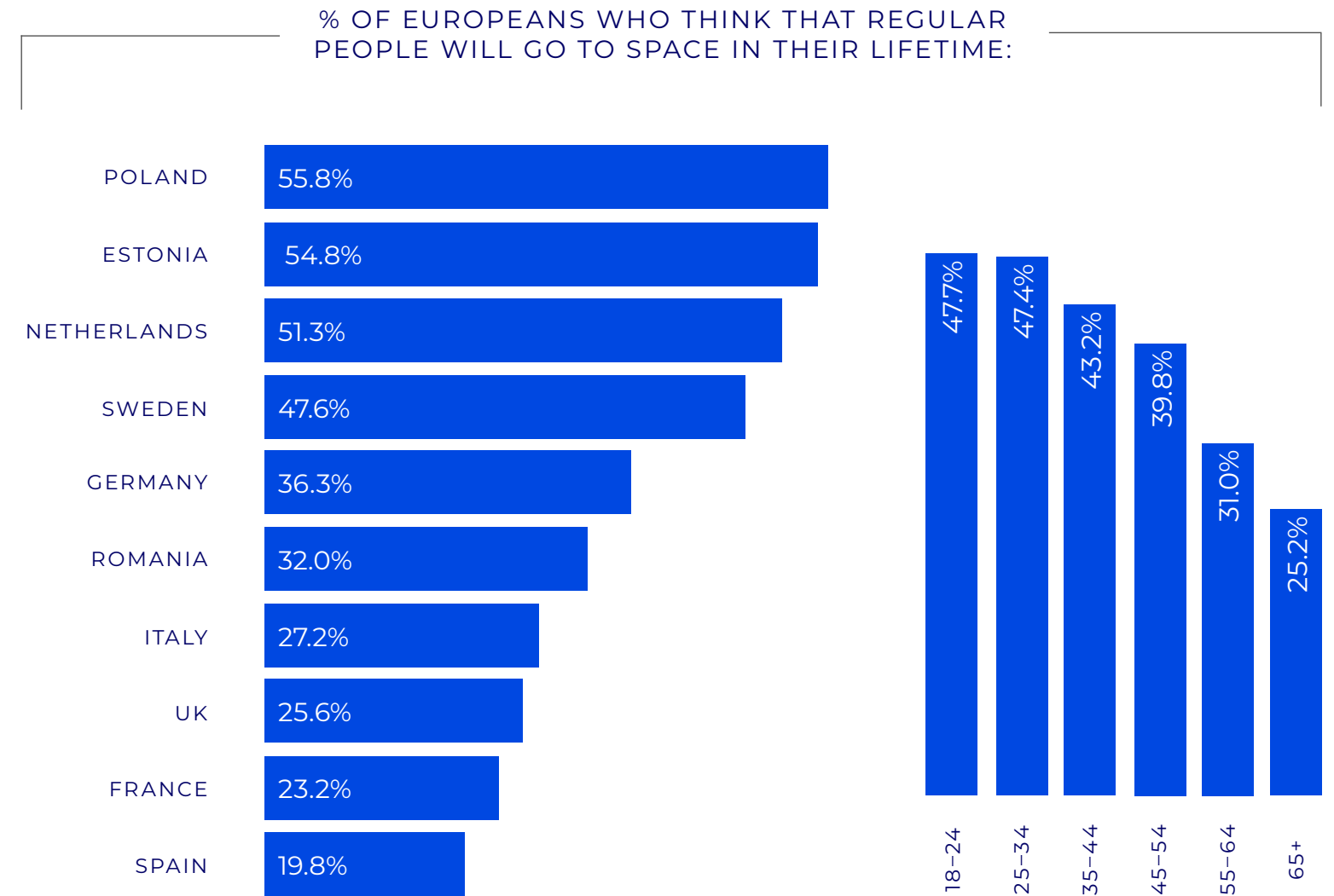
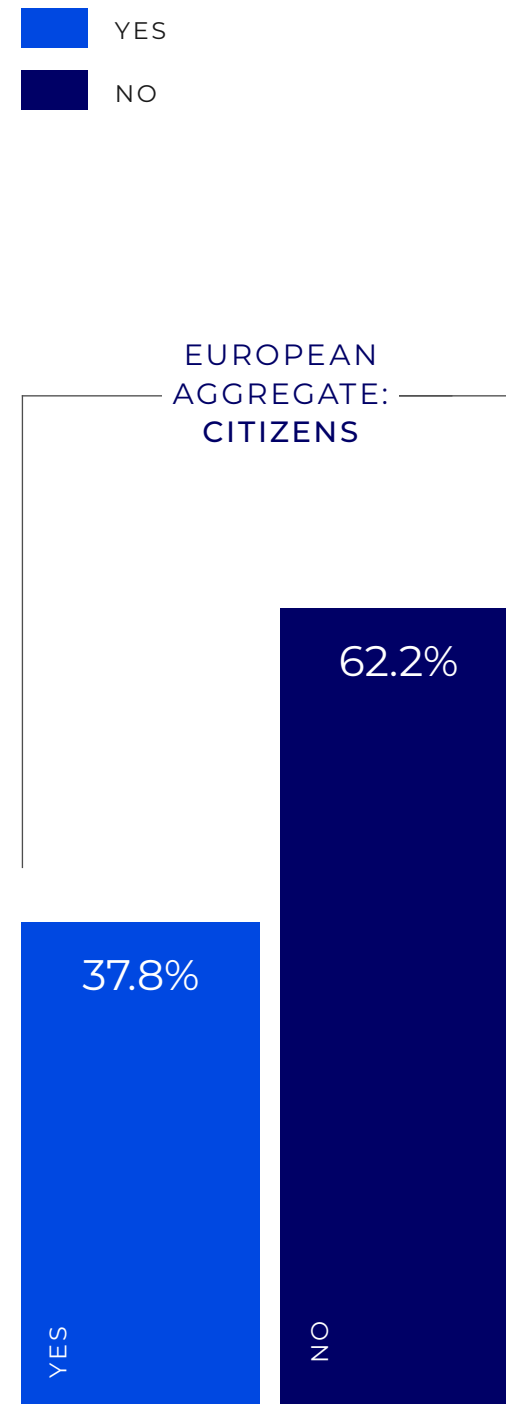
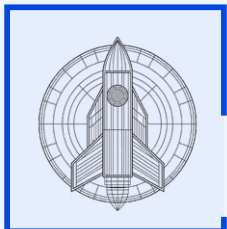


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QUESTION: Do you believe that regular people will go to space in your lifetime?

THE SPACE RACE

- 37.8% of Europeans believe that regular individuals will travel to space during their lifetime.
- This expectation is notably higher in Poland (55.8%), Estonia (54.8%), and the Netherlands (51.3%), where over half of citizens believe space travel will be accessible to ordinary people.
- Almost half (47.4%) of Europeans under 35 think they will see people go to space in their lifetime.



Source: European Tech Insights 2024. Center for the Governance of Change, IE University.

SURVEY METHODOLOGY

Responses from
3,006 adults

Spanning
10 countries

European Tech Insights 2024 was conducted through two surveys: one targeting the general population and a second with a qualitative focus on public servants.

In the **general population survey**, the Center for the Governance of Change at IE University gathered responses from 3,006 adults spanning 10 countries: Estonia, France, Germany, Italy, the Netherlands, Poland, Romania, Spain, Sweden, and the United Kingdom. The samples maintained a representative balance with regards to age, gender, region and studies.

Respondents were part of recurrent panels recruited by Netquest or affiliated companies into panels via social media, direct mailing or through referrals from other respondents. They receive small in-kind incentives for responding to each survey.

In the **public servants survey**, Apolitical initiated a panel among its network members, which includes public servants from over 100 countries. This survey gathered 47 responses from public servants in the same ten countries as the citizen sample.

In the analysis, responses categorized as 'don't know' or left unanswered were treated as missing data.

Since its inception in 2019, this survey has become a cornerstone project of IE University. Each year, we develop a new set of questions to delve into the emerging challenges at the intersection of society and technology. The exception is question 10, which is repeated annually to facilitate longitudinal analysis.

AUTHORS

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Executive Director



Carlos Luca de Tena Piera is the Executive Director of the Center for the Governance of Change.

A public policy specialist, Carlos has advised multilateral organizations and multinational companies in public affairs and technology governance. He previously worked as a Consultant at Llorente & Cuenca and APCO Worldwide and was in charge of European Affairs at the French Association of Town Mayors.

Carlos holds a master's degree in European Affairs from Sciences Po Paris and the University of Bath and studied as an undergraduate at Sciences Po Paris, Universidad Carlos III de Madrid and the London School of Economics.

Darío García de Viedma,
Associate Director



Darío García de Viedma works as Associate Director at the Center for the Governance of Change at IE University.

During his career in AI, he contributed to building Citibeats—an Ethical-AI software designed to help decision-makers prevent the next crisis.

He conceptualized machine learning models to measure complex aspects of public opinion such as Social Unrest, Distrust or Polarisation.

Darío has offered consulting services to public and private institutions in over 90 countries. In addition, he teaches at the Masters of Political Communication at the Universidad Camilo José Cela. He is also actively involved in public speaking and technological thought leadership.

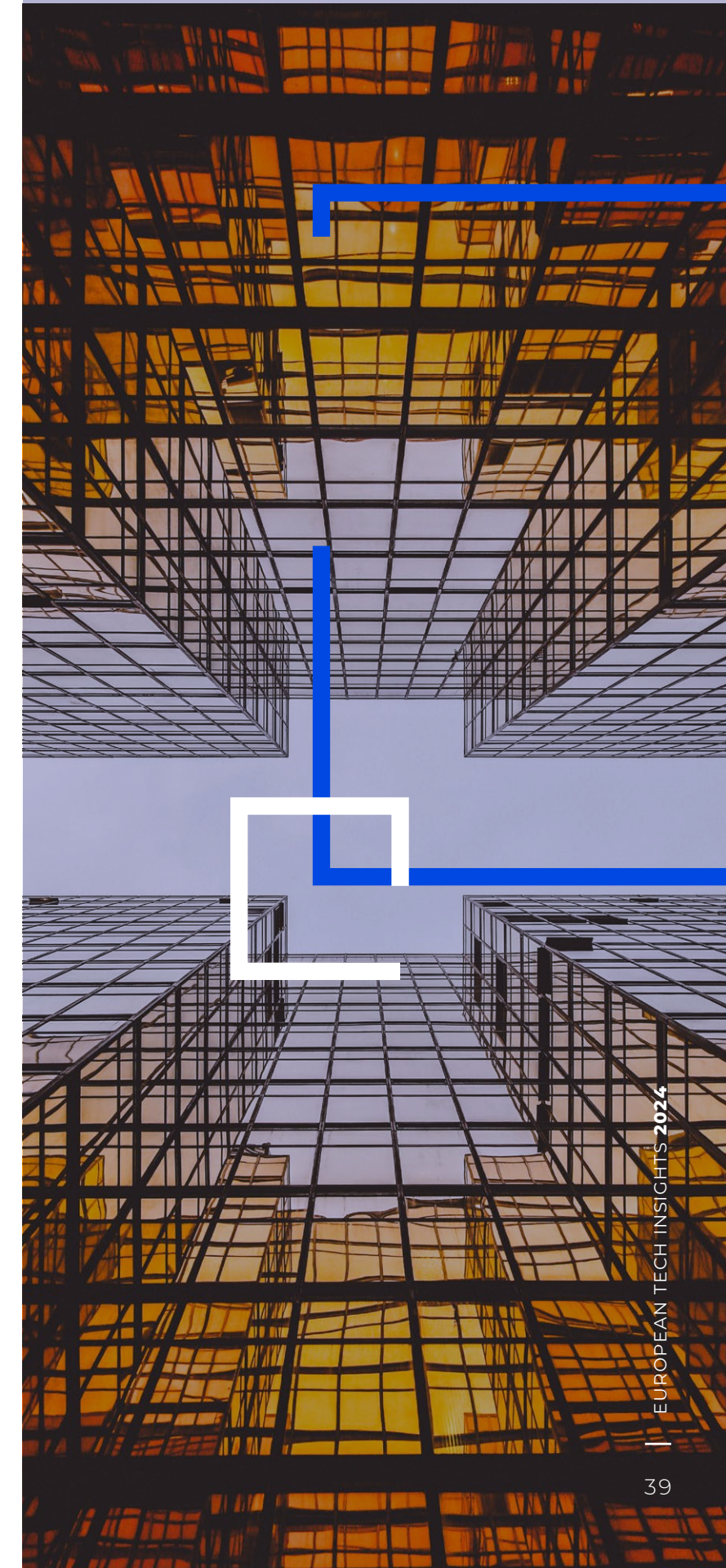
Ula Rutkowska
Senior Researcher

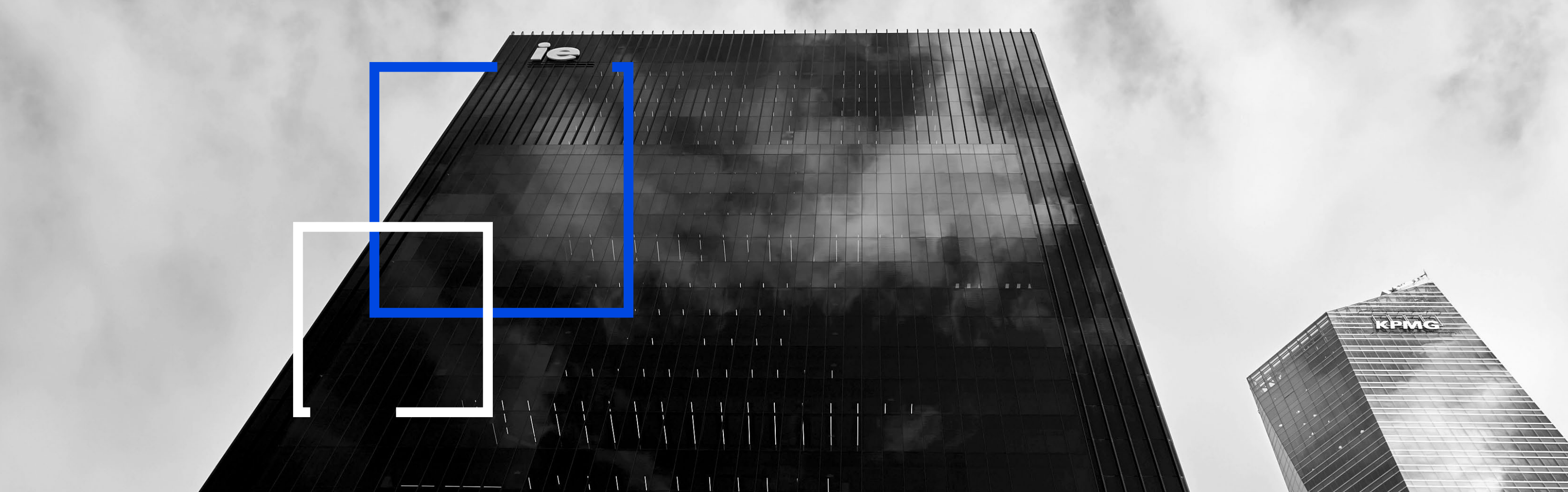


Ula Rutkowska is a Senior Researcher at Apolitical, specialising in government and the critical challenges faced by public servants worldwide.

With expertise in customer and user research methodologies, Ula contributes to various projects, ranging from segmentation and categorisation to learning design and thought leadership. Her research focuses on uncovering valuable insights into the needs and preferences of public sector professionals, particularly in areas such as capacity building, procurement, digital transformation, climate, and AI. Ula's work aims to develop innovative solutions to enhance government efficiency and effectiveness.

In addition to her professional role, Ula is pursuing a PhD in English Literature at Brown University and holds an MPhil in Modern and Contemporary English Literature from the University of Cambridge.





ABOUT THE CGC

The Center for the Governance of Change (CGC) is an applied-research, educational institution based at IE University that studies the political, economic, and societal implications of the current technological revolution and advances solutions to overcome its unwanted effects.

The CGC does so by producing pioneering impact-oriented research that cuts across disciplines and methodologies to unveil the complexity of emerging technologies such as Artificial Intelligence, Big Data, Blockchain, and Robotics, and explore its potential threats and contributions to society.

Moreover, the CGC also runs a number of executive programs on emerging tech for public institutions and companies interested in expanding their understanding of disruptive trends, and a series of outreach activities aimed at improving the general public's awareness and agency over the coming changes.

All this for one purpose:

**TO HELP BUILDING A MORE
PROSPEROUS AND SUSTAINABLE
SOCIETY FOR ALL.**

ABOUT APOLITICAL

APOLITICAL IS THE WORLD'S LARGEST COMMUNITY OF PUBLIC SERVANTS, WITH A MISSION TO BUILD 21ST CENTURY GOVERNMENTS THAT WORK FOR PEOPLE AND THE PLANET.

Apolitical is used by 250,000 public servants and policymakers in 160 countries to find and share best practice through communities of peers, and to upskill with flexible online learning on 21st century government priorities.

Members range from mayors and ministers to policy pioneers and digital innovators. Apolitical's courses are co-developed with partners at leading universities and research institutions, including Oxford, the London School of Economics and Georgetown. Our flagship programmes include climate and sustainability, digital and AI, and the 21st century state.

