Online Scenario Process

POST CORONA-SCENARIOS

Society, economy and politics after the Corona crisis

Preliminary documentation

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ScMI AG
Klingenderstr. 10-14
33100 Paderborn/Germany
Phone: +49 5251 150570
Mail: info@scmi.de
Web: www.scmi.de

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Our view of the future ...

Foreseeing different futures and dealing with uncertainty:

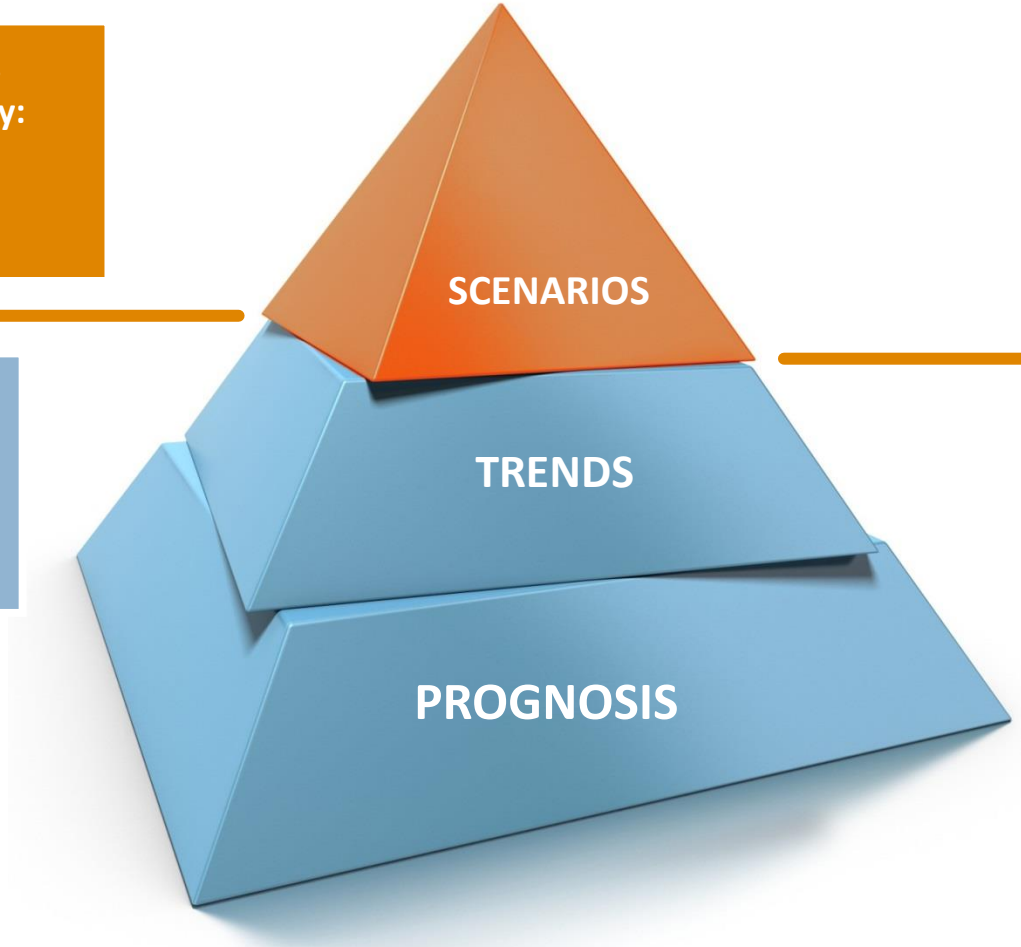
- Future-open and interconnected
- Qualitative and mainly long-term

Recognizing the future in the current changes:

- Direction-setting
- More qualitative and mainly mid-term

Derive the future from the past:

- Descriptive
- Quantitative and mainly short-term



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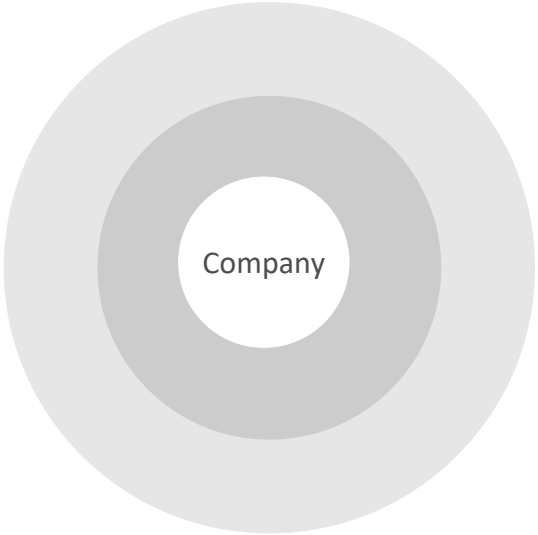
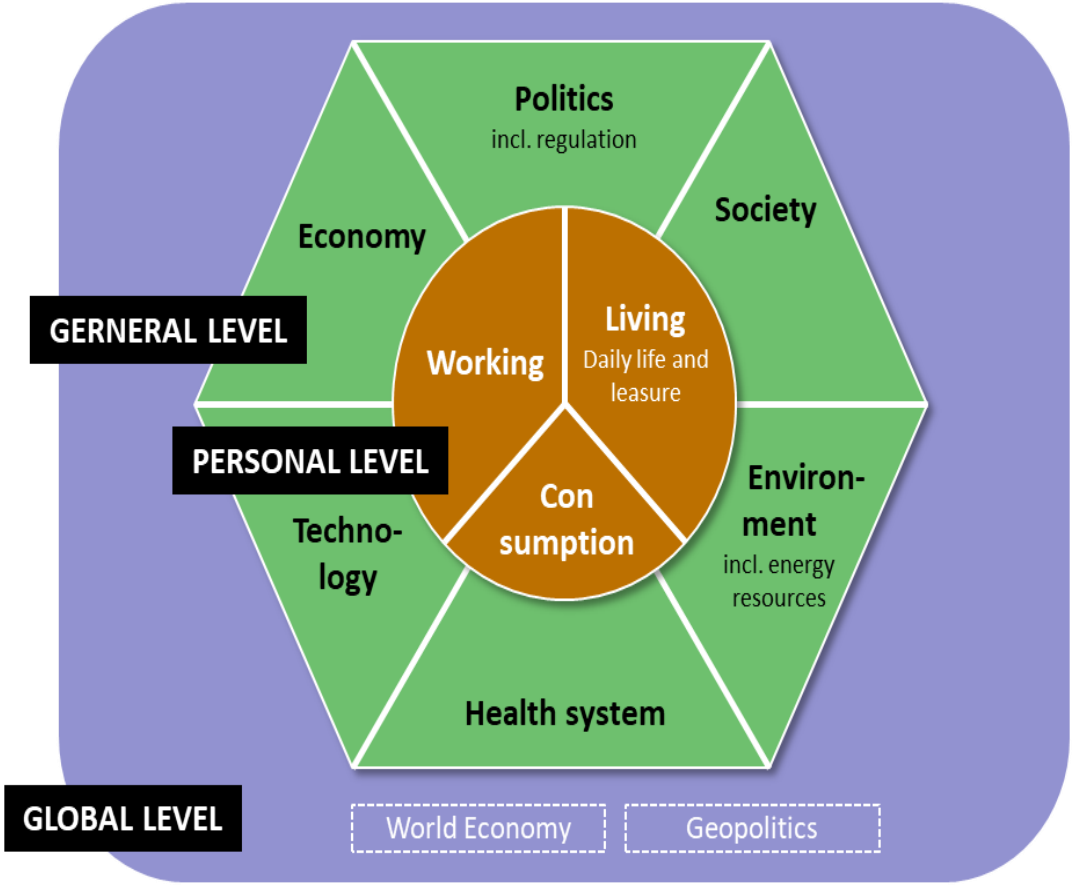
Scenario development: Scenario field analysis





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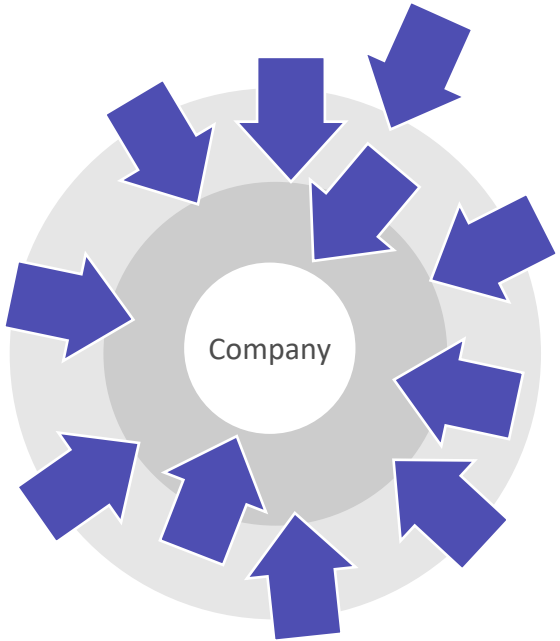

1.1 Life (everyday life and leisure)

1 Living together family / household
2 Social contacts / friends and neighbourhoods
3 Rules of conduct/ hygiene
4 Attitude to life/ sense of security and protection
5 Leisure and leisure behaviour
6 Associations, public festivals, major events
7 Communication behaviour
8 Mobility behaviour/systems
9 Tourism
10 Nutrition

1.2 Working life

11 Working hours
12 Employment contracts/remuneration
13 Attitude to work / work-life balance
14 Office space/architecture
15 Work organisation/home offices
16 Business travel/ communication
17 Employee fluctuation/ choice of job

1.3 Consumer behaviour

18 Propensity to consume
19 Consumption patterns / user behaviour
20 Stockpiling / self supply
21 Shopping behaviour / retail trade
22 Goods logistics

2.1 Public sector

23 Decision-making structures/ federalism
24 Trust in politics / commitment and participation
25 Conceptual design / policy direction
26 Specific post-corona policy
27 Government influence/ regulation
28 Developing/expanding crisis resilience
29 Administrative structures/processes
30 Fiscal policy/ public budgets

2.2 Economy

31 Economic growth/ -power
32 Economic and corporate structures
33 Value chains and structures
34. Business ethics/ role of the companies in the society
35 Digital transformation of the economy
36 Labour market development
37 Corporate / resilience strategies

2.3 Company

38 Value systems/ faith and spirituality/ ethics
39 Life attitudes / lifestyles
40. Solidarity/ relations between the generations
41 Distribution of wealth / disparities in society
42 Social security systems
43 Childcare, school and training
44 Migration and integration
45 Spatial development/ settlement structures/ housing
46 Data protection, privacy and surveillance
47 Role of media and science

2.4 Technology

48 Technology progress / acceptance
49 Technology and innovation policy
50 Digital transformation of society
51 Digital technologies

2.5 Environment, energy and resources

52 Environmental awareness / resource efficiency
53 Environmental, sustainability and climate policy
54 Energy requirement/ energy generation
55 (Energy) Raw materials

2.6 Healthcare system

56 Healthcare system
57 Degree of privatisation in the health sector
58 Health insurance/ financing of the health system
59 Health surveillance and care
60 Geriatric care
61 Health care/attitude to health
62 Pharmaceutical supply/ pharmaceutical and medical technology
63 New pandemic developments
64 Dealing with pandemics / medical and virological progress

3.1 World Economy

65 Global economic development
66 Stability of global value chains
67 World trade
68 Global financial and capital markets
69 Geopolitical economic areas

3.2 World Politics

70 European Union
71 Global cooperation and institutions
72 Global stability
73 Global mobility

4 Pandemic progression and immediate consequences

74 Health consequences/ treatment options
75 Duration of the Corona pandemic in Germany
76 Consequences for the private sector
77 Consequences for the financial sector and policy
78 Political crisis management/ strategy
79 Course of the crisis at global level

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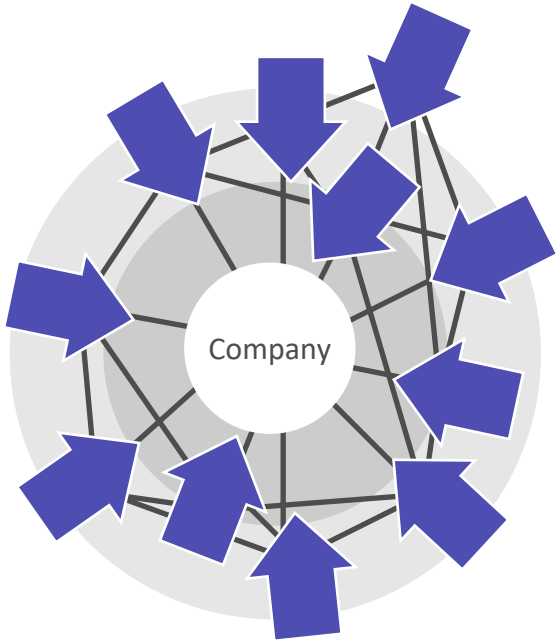
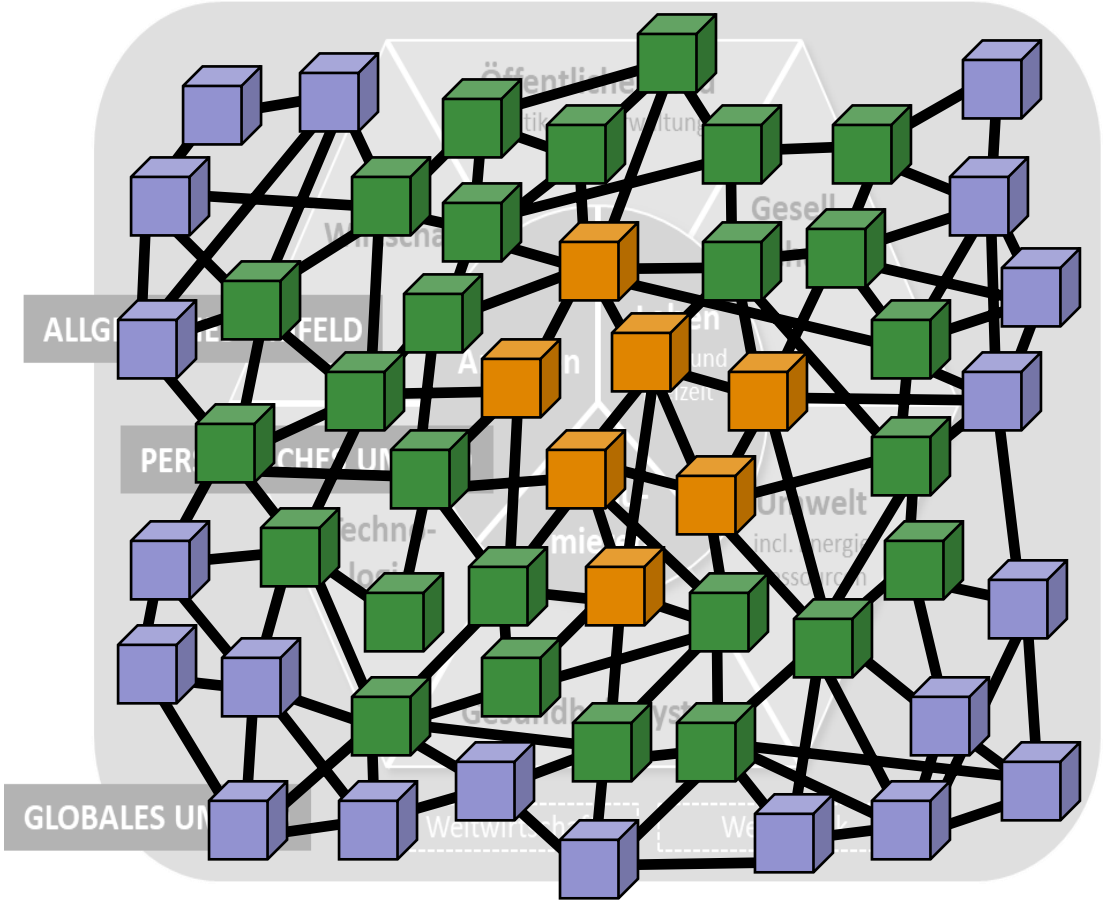


Scenario Field Analysis

What are the key factors for understanding the economy and society after the Corona crisis?



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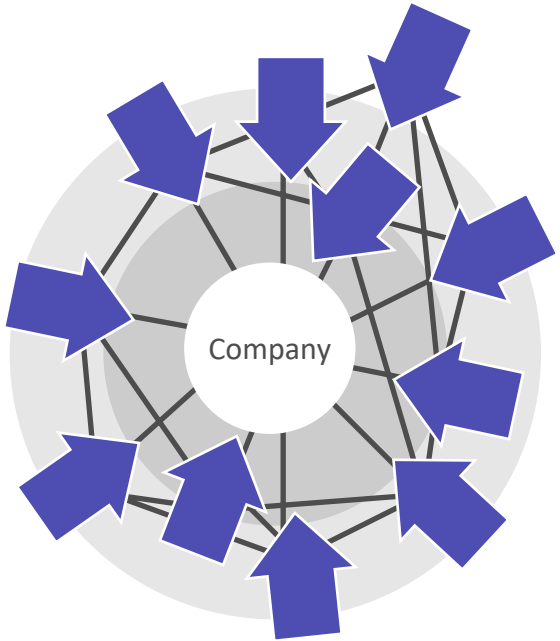

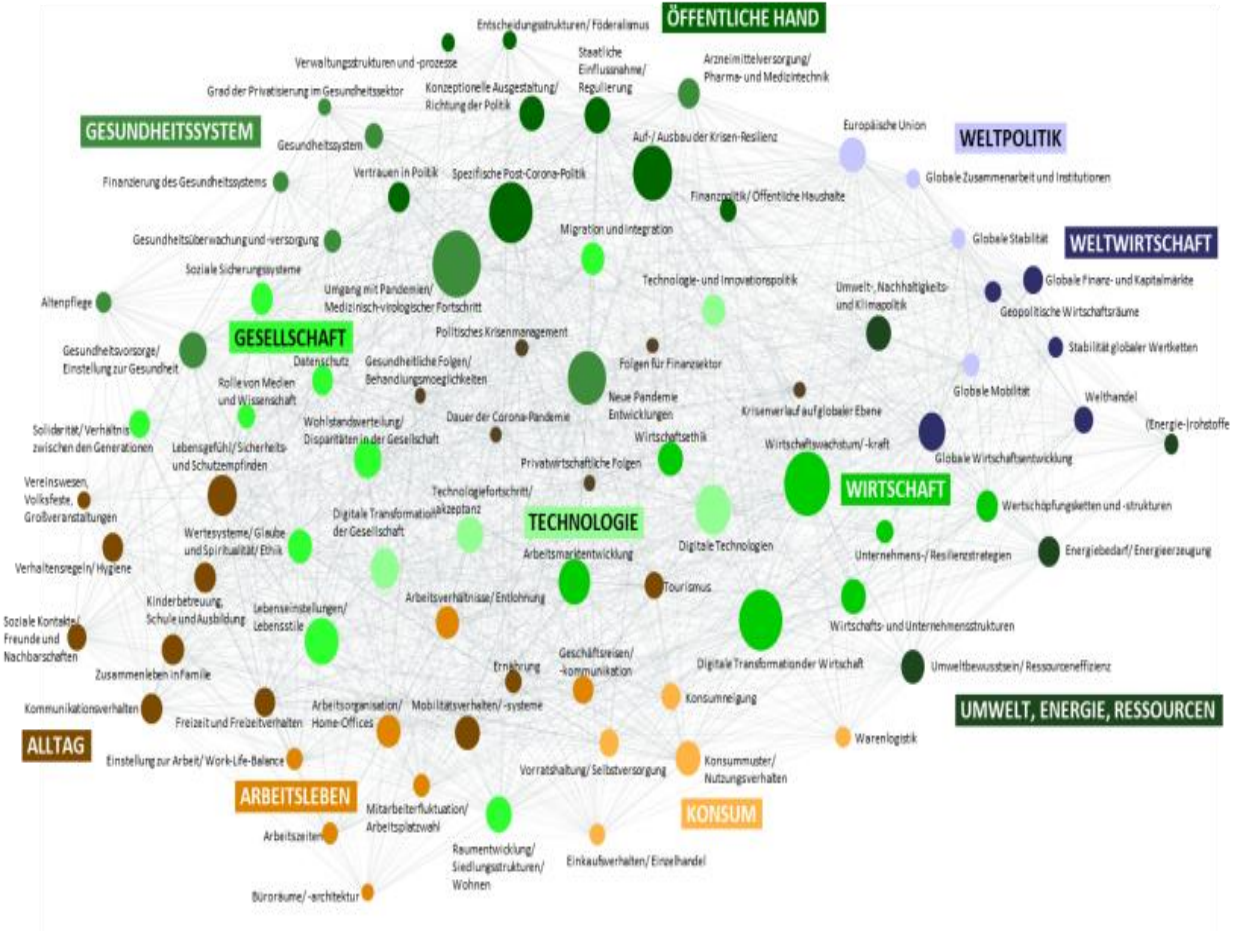

Preliminary work

Scenario Field Analysis

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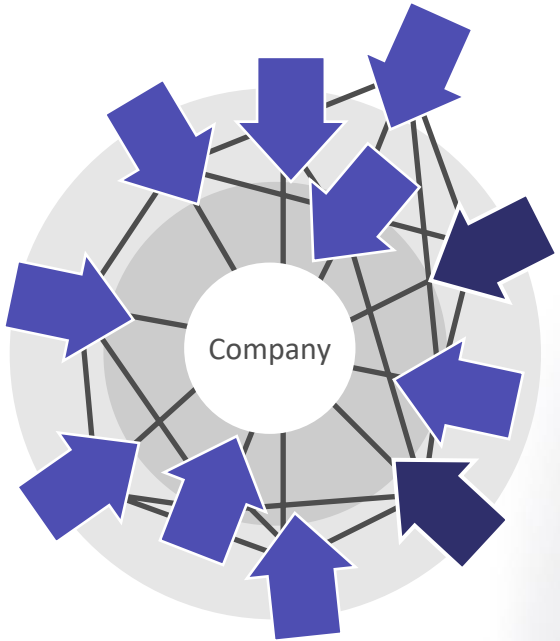

Our questions to the future!

1	New pandemic developments and global crises
2	Environment, climate and sustainability
3	World Politics
4	Global economic development and world trade
5	Global technology development
6	European Union
7	Economic development and structure
8	Digital transformation of the economy
9	Technology and innovation policy
10	Data protection and digital transformation of society
11	Participation, wealth distribution and social security
12	Crisis resilience of politics and economy
13	State influence and political orientation
14	Public opinion formation
15	trust in politics
16	Dealing with pandemics / Medical progress
17	Healthcare system
18	Labour market / Employment relationships and remuneration
19	Attitude to work / work organisation
20	Consumption patterns / user behaviour
21	Sense of life / sense of security and protection
22	Attitudes to life / Lifestyles
23	Life and everyday life / communication behaviour

liminary work

Scenario Field Analysis

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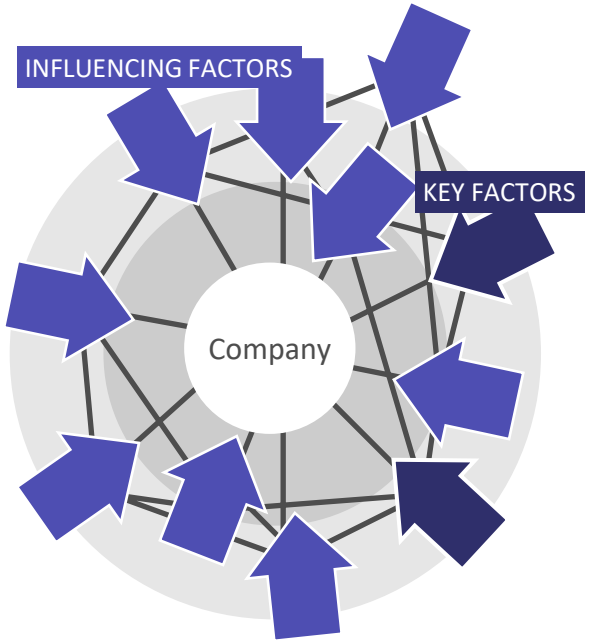
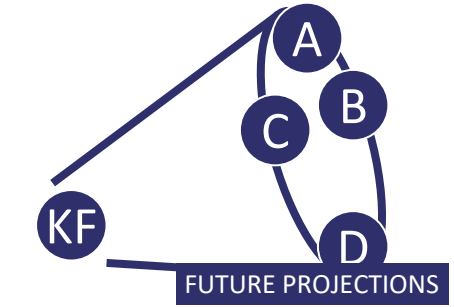
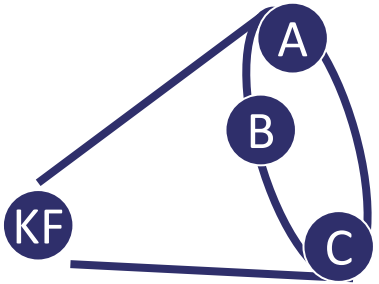
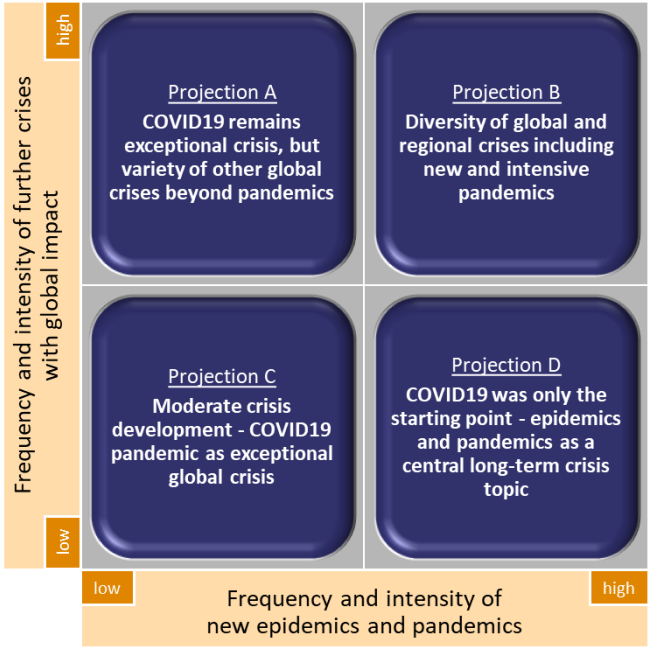
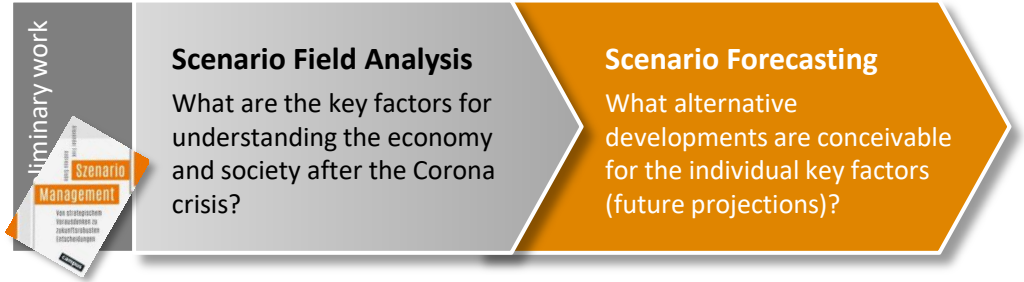
Scenario development: Scenario forecasting











When developing future projections, it is important to look at the key factor from different perspectives and ultimately filter out the most relevant development opportunities.

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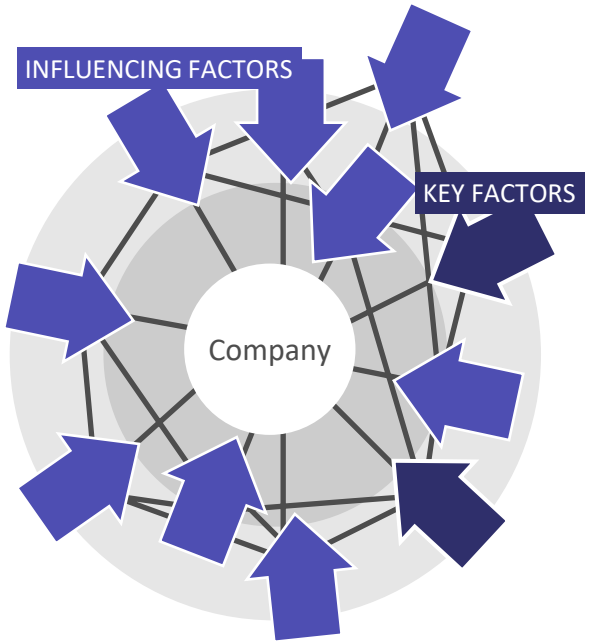
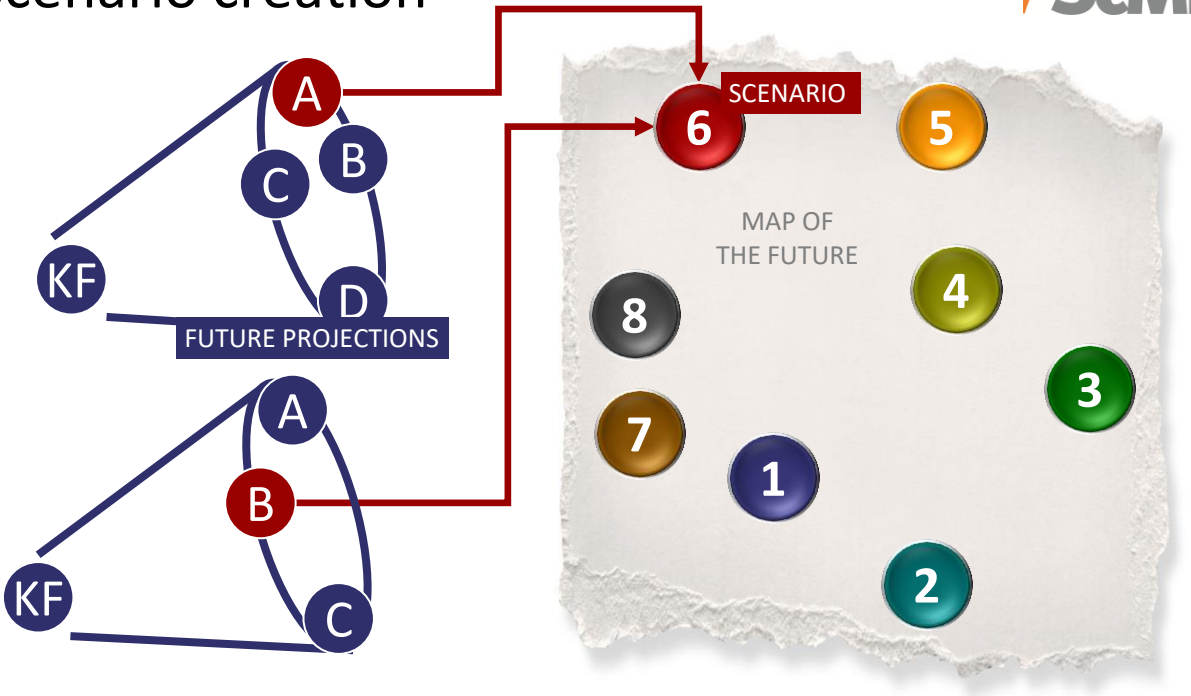
Scenario development: Scenario creation





liminary work

Scenario Field Analysis

What are the key factors for understanding the economy and society after the Corona crisis?

Scenario Forecasting

What alternative developments are conceivable for the individual key factors (future projections)?

Scenario creation

Which plausible scenarios (as a plausible combination of future projections) are conceivable and how are these scenarios related?

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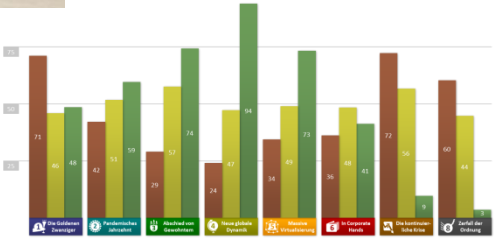
Scenario Interpretation: Scenario Evaluation

Scenario evaluation is the continuous reading of the map of the future



Preliminary work

Scenario Field Analysis

What are the key factors for understanding the economy and society after the Corona crisis?

Scenario Forecasting

What alternative developments are conceivable for the individual key factors (future projections)?

Scenario building

Which plausible scenarios (as a plausible combination of future projections) are conceivable and how are these scenarios related?

Scenario interpretation

- Scenario-Communication
- **Scenario assessment**
- Consequence analysis

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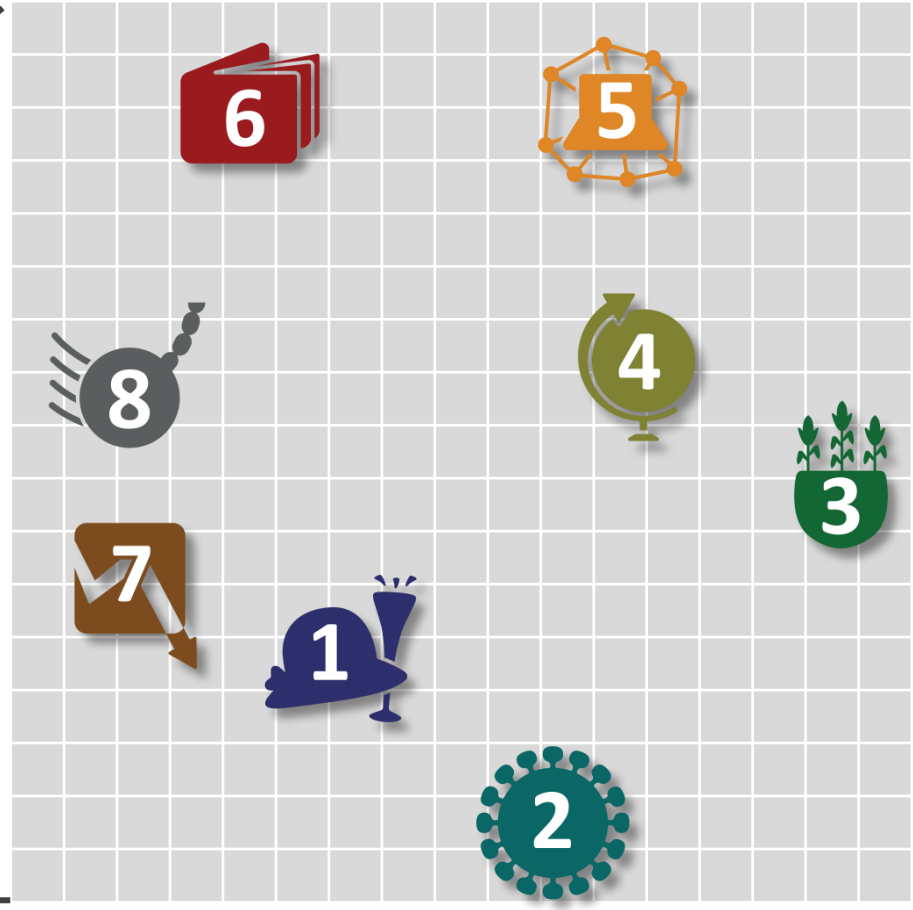
Map of the future



Today

ZIELBILDNER

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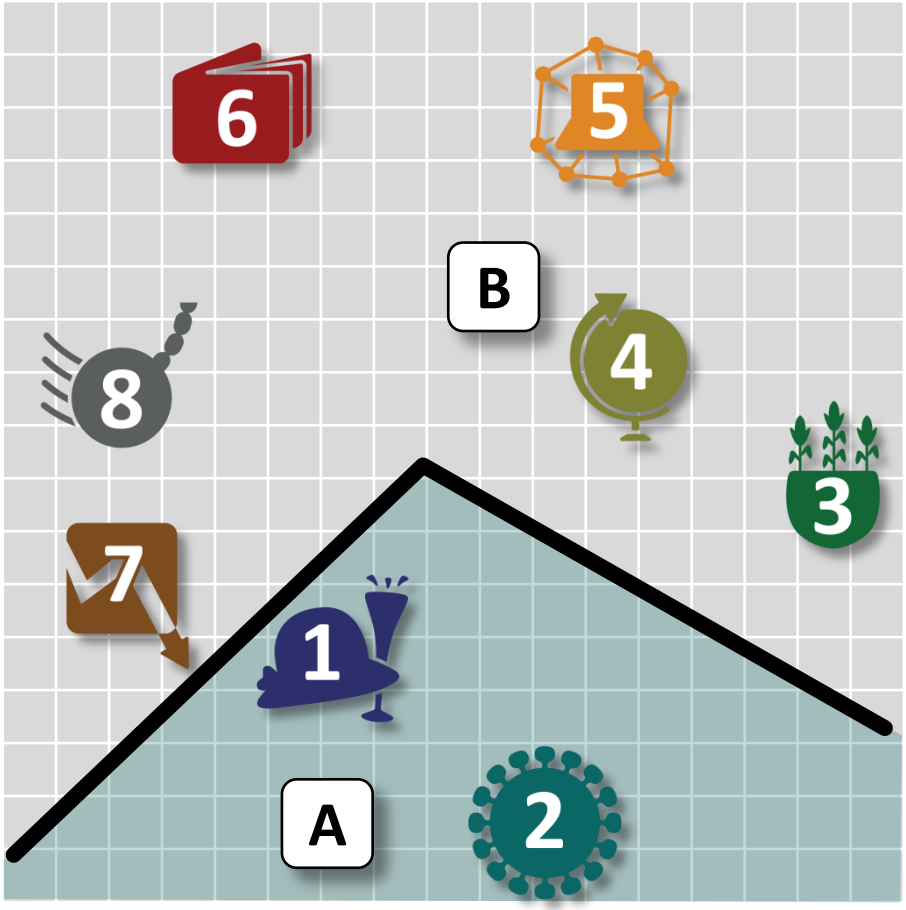
Map of the future

A Few global crises - Success in traditional structures

- Low frequency and intensity of further crises with global impact
- High importance and rigour of data protection (policy)
- Little change in the labour market and employment relationships
- ***The German economy is reinventing itself in its key industries and further expanding its position as the world's leading exporter***
- ***People would like to use more possibilities of digital transformation - but are prevented from doing so by restrictive data protection***
- ***Traditional educational and social systems are guarantors for a high overall participation in society***
- ***Return to physical contacts - virtual contacts play a minor role in everyday life***

B Many other crises require a reaction - and that may or may not take place

- High frequency and intensity of further crises with global impact
- Low importance and strictness of data protection (policy)
- Significant change in the labour market and employment relationships



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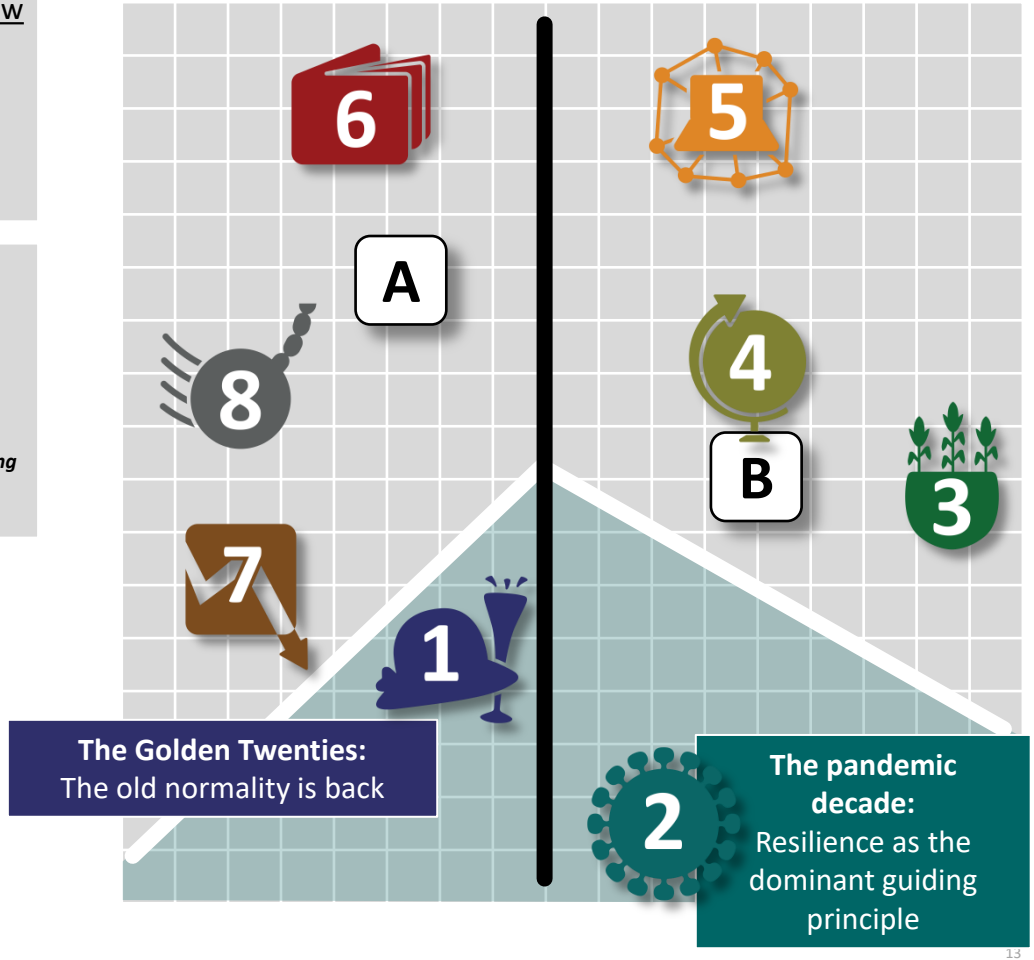
Map of the future

A No proven resilience strategies of the public sector and low subjective well-being

- Low importance of public sector relic strategies
- Low learning speed of health systems, politics and society in dealing with pandemics
- Low crisis resilience of the health care system
- Low sense of justice in society / Low subjective well-being

B Resilience strategies of the public sector ensure crisis resilience and subjective well-being

- High importance of public sector relic strategies
- High learning speed of health systems, politics and society in dealing with pandemics
- High crisis resilience of the health care system
- High sense of justice in society / High subjective well-being
- ***Both politicians and companies are strengthening their foresight and increasingly focusing on resilience strategies***



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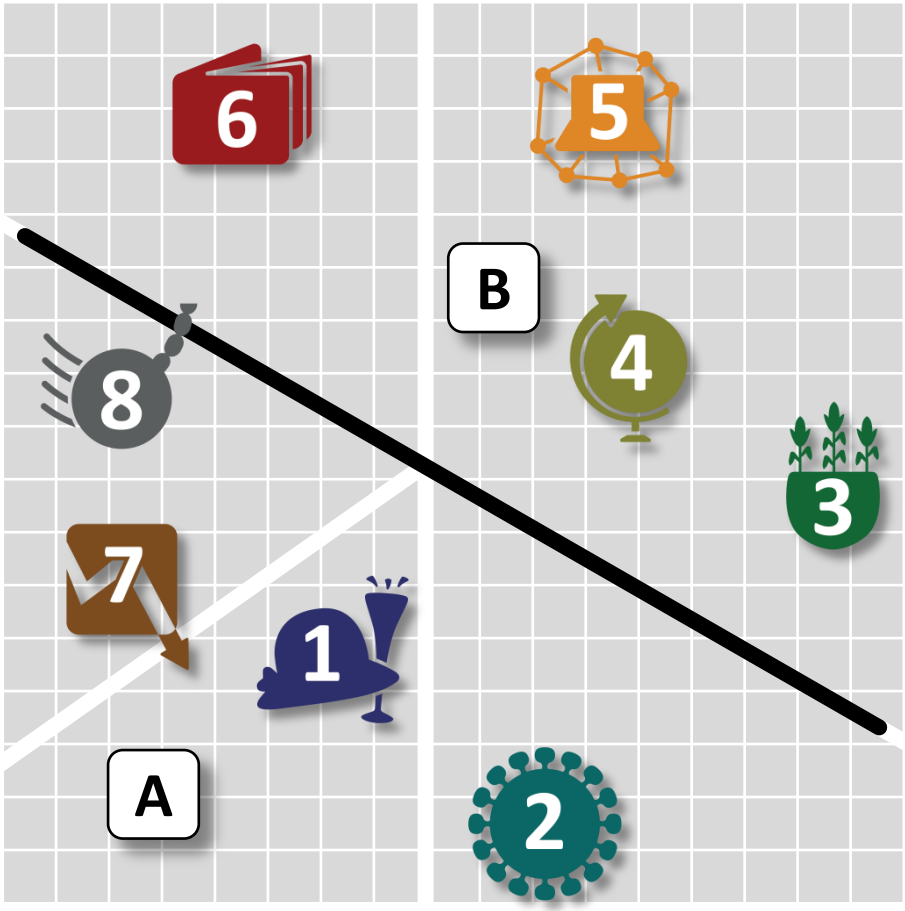
Map of the future

A Low innovation and traditional structures Germany falls behind in digital transformation

- Low importance of environment, climate and sustainability in political, corporate and/or consumer decisions
- Medium or high scope and intensity of authoritarian and nationalist developments
- Low degree of structural change in the German economy
- Low degree of innovation / low innovative capacity of the German economy in digital technologies
- Little change in social and education systems
- Little medical-virological progress
- Evolutionary efficiency gains in the health care system through technology deployment
- Low flexibility and agility of work organisation (including the importance of home office)
- Low sustained virtualisation of everyday life
- ***Germany falls (far) behind in digital transformation***

B Broad innovation, structural change and virtualisation of everyday life

- High importance of environment, climate and sustainability in political, corporate and/or consumer decisions
- Small scale and intensity of authoritarian and nationalist developments
- High degree of structural change in the German economy
- High degree of innovation / high innovative capacity of the German economy in digital technologies
- Major changes in social and education systems
- High medical-virological progress
- Revolutionary efficiency gains in the health care system through technology deployment
- High flexibility and agility of work organisation (including the importance of home office)
- Strong ongoing virtualization of everyday life



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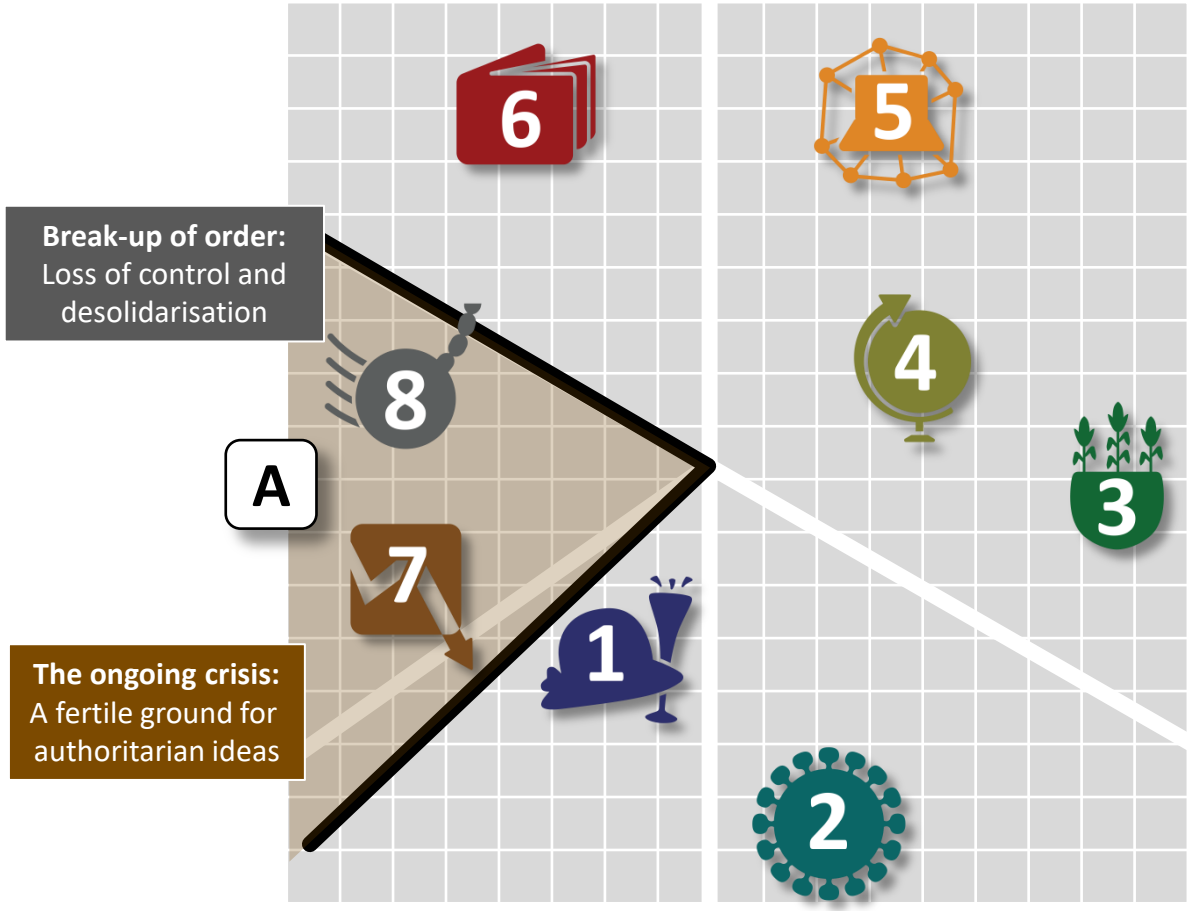
Map of the future

A Protectionism exacerbates economic crisis - mistrust in politics and cemented disparities

- *Even massive environmental and climate impacts do not lead to a significant change in the priorities of P-U-K*
- *Turning away from global world trade slows down global economic momentum*
- *Low openness of technological development with significant risks*
- *Countries and georegions strive for greater self-sufficiency in their technology and innovation policies*
- *Rigid educational and social systems cement social disparities in society*
- *Moving away from traditional political systems with a tendency to have little trust in politics*
- *Corona shock leads to high unemployment with tendency towards traditional pay systems*



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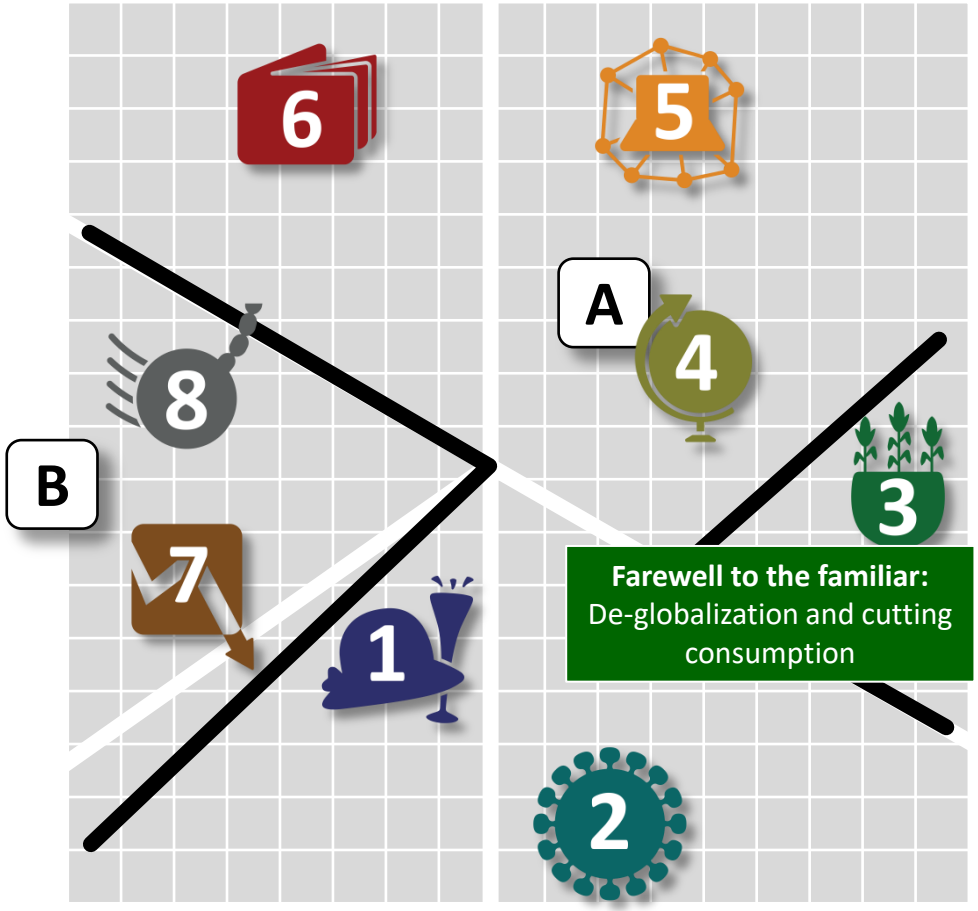
Map of the future

A Free world trade, global division of labour and high degree of globalisation of the German economy

- Little direct pressure for action in Germany (DACH) due to environmental and climate impacts
- Strong development of world trade / free trade
- High openness of technological development / global standards
- High degree of globalisation of the German economy/ Strong global position of Germany in the world economy
- Continued high global division of labour in technology and innovation

B Reduction of world trade and the global division of labour with a lower degree of globalisation of the German economy

- High direct pressure to act in Germany (DACH) due to environmental and climate impacts
- Reduced development of world trade / protectionism
- Low openness of technological development / global standards
- Reduced degree of globalisation of the German economy/ Weak global position of Germany in the world economy
- Significantly reduced global division of labour in technology and innovation



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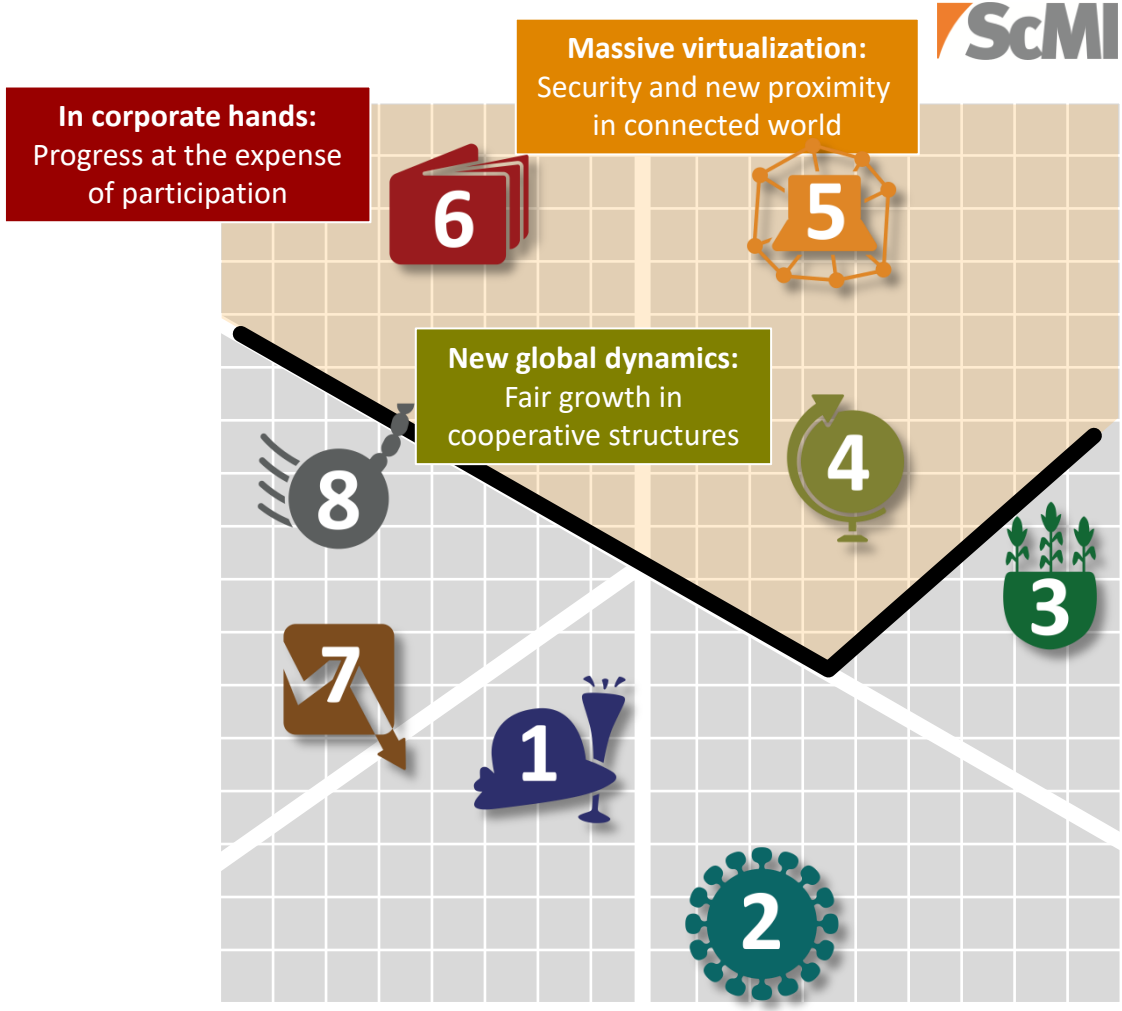

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Map of the future

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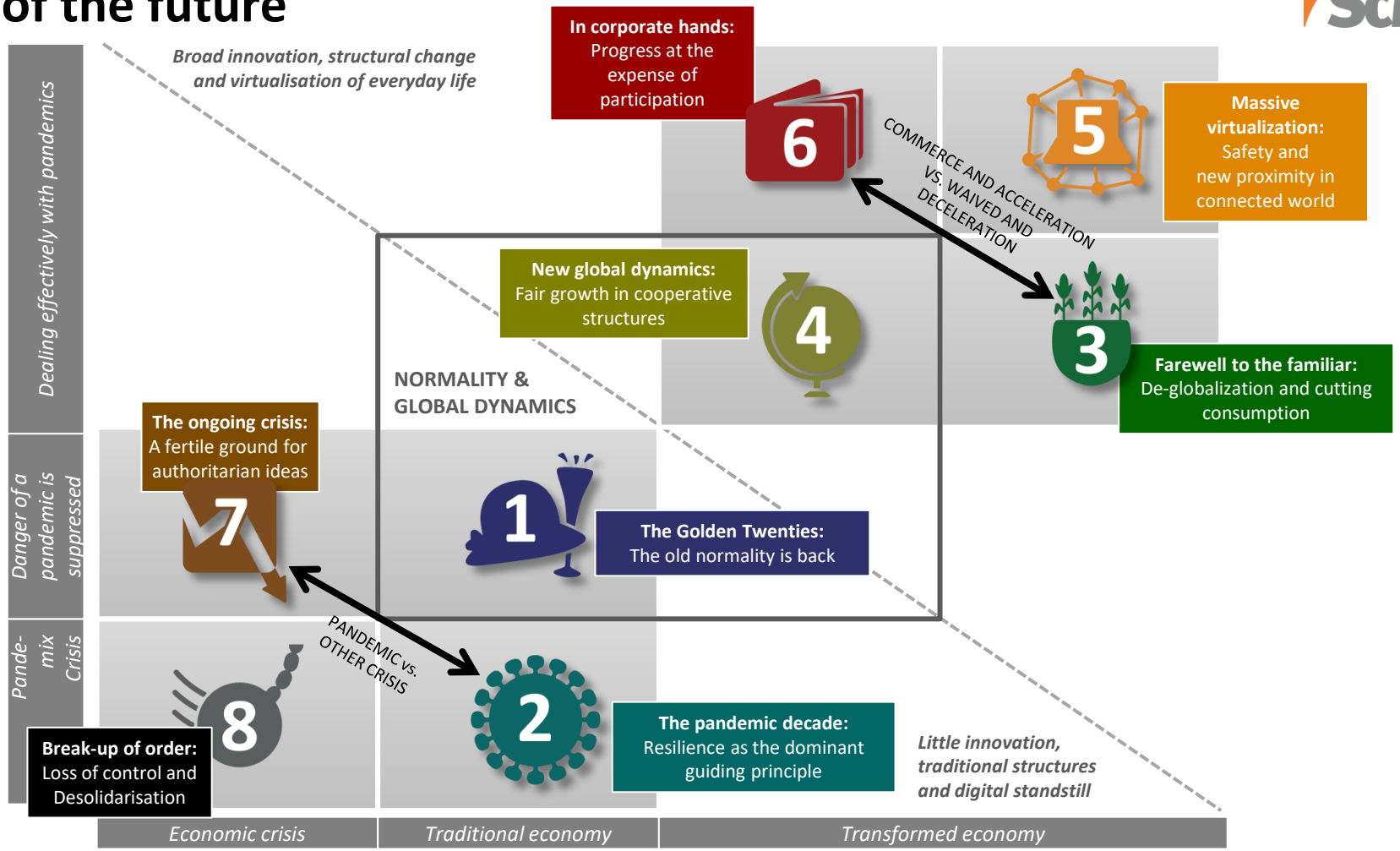

Scenario 1: The Golden Twenties

The old normality is back

- The memory of COVID19 as a short-term shock fades - the world has returned to **old normality and crisis repression.** Even the economic slump was quickly overcome in most countries.
- The German economy has continued to focus on its key industries and has strengthened its position as the **world's export champion** in a **reinvigorated free trade system.** In return, Germany is lagging far behind others in the digital transformation.
- Successful crisis management has led to a sustainable **strengthening of the political centre.** Fear and insecurity were quickly overcome and the **old attitude towards life** with its pronounced individualism has returned.
- Physical contact is again dominating everyday life; people are following **old patterns of consumption** and making up for missed leisure and consumption opportunities.
- **The new carefreeness** is associated with the renunciation of proven resilience strategies or systemic changes in the health care system.

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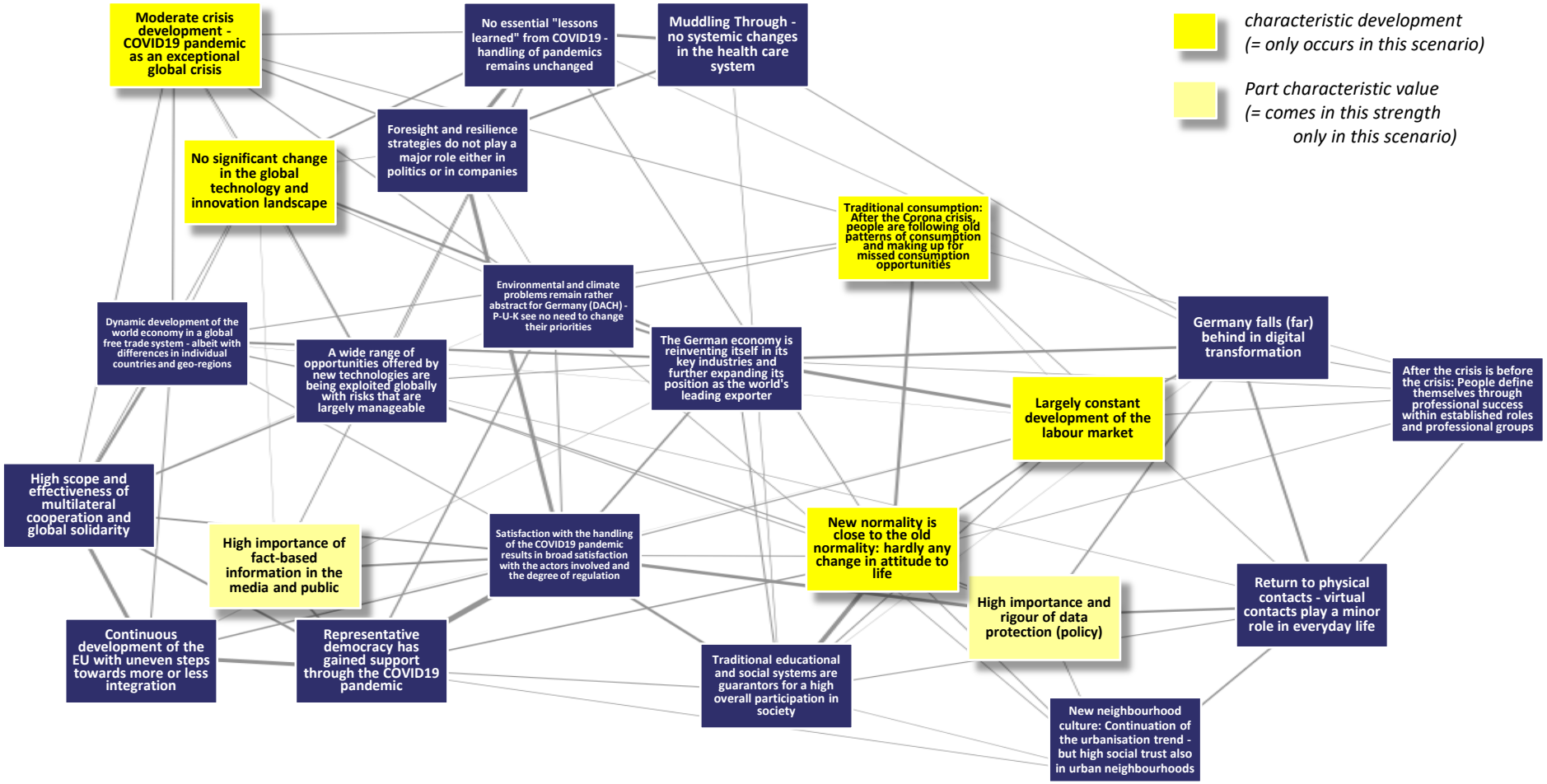
Scenario 1: The Golden Twenties



Scenario 2: The pandemic decade

Resilience as the dominant guiding principle

- COVID19 was only the beginning: **New pandemics are** changing all areas of life and are reducing the perception of other crises such as climate change. The **international community is working** together to counter the new threat.
- However, not even the return to multilateral thinking and free world trade can prevent the measures from repeatedly leading to **economic slumps** and an overall **reduced innovation dynamic.**
- The German economy relies on its key industries and can largely maintain its position there.
- The pandemic focus leads to a **high need for security** and ultimately to health systems and policies in general being designed to deal with possible pandemics much better than before. This also includes the **adaptation of remuneration systems**, i.e. improved payment for occupations relevant to resiliency.
- The **consumer climate is suffering** from the critical economic situation and the increasing tax burden. Social life is taking place in **smaller units** - overcrowded cities are becoming less attractive.

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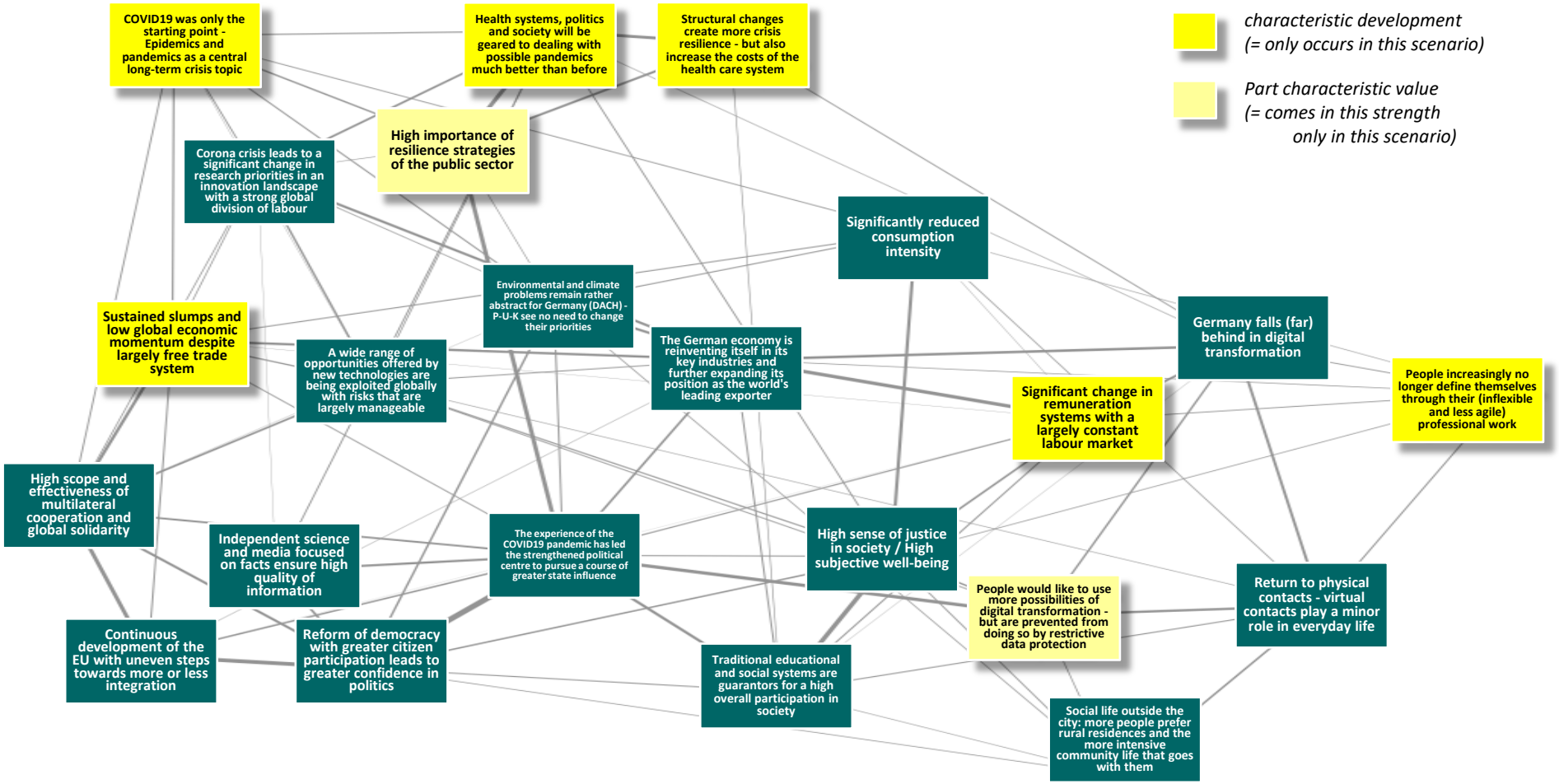
Scenario 2: The pandemic decade



Scenario 3: Farewell to the familiar

De-globalization and cutting consumption

- Pandemics are not everything: a **variety of crises are** shaking humanity. Massive environmental and climate problems are forcing politics, business and consumers to **change their priorities**.
- Globally, a system of different spheres of interest is emerging - as well as within the European Union. Within the **new blocks,** production is increasingly regional, so that the global flow of goods is reduced.
- **A paradigm shift is** taking place in the German economy: growth at any price no longer exists and the former export world champion has to reinvent himself. A wide range of innovations are promoting **structural change** and are creating a number of "digital champions".
- In politics, the balance is shifting towards **stronger regulation and greater public influence**. Both the public sector and companies are strengthening their foresight and increasingly relying on **resilience strategies**.
- The broad return to **sustainable values** leads to a **conscious renunciation of consumption**. Virtual communication is used additionally - but does not replace physical contact. Social life is focused on **local units** and the model of urban life is losing its lustre.

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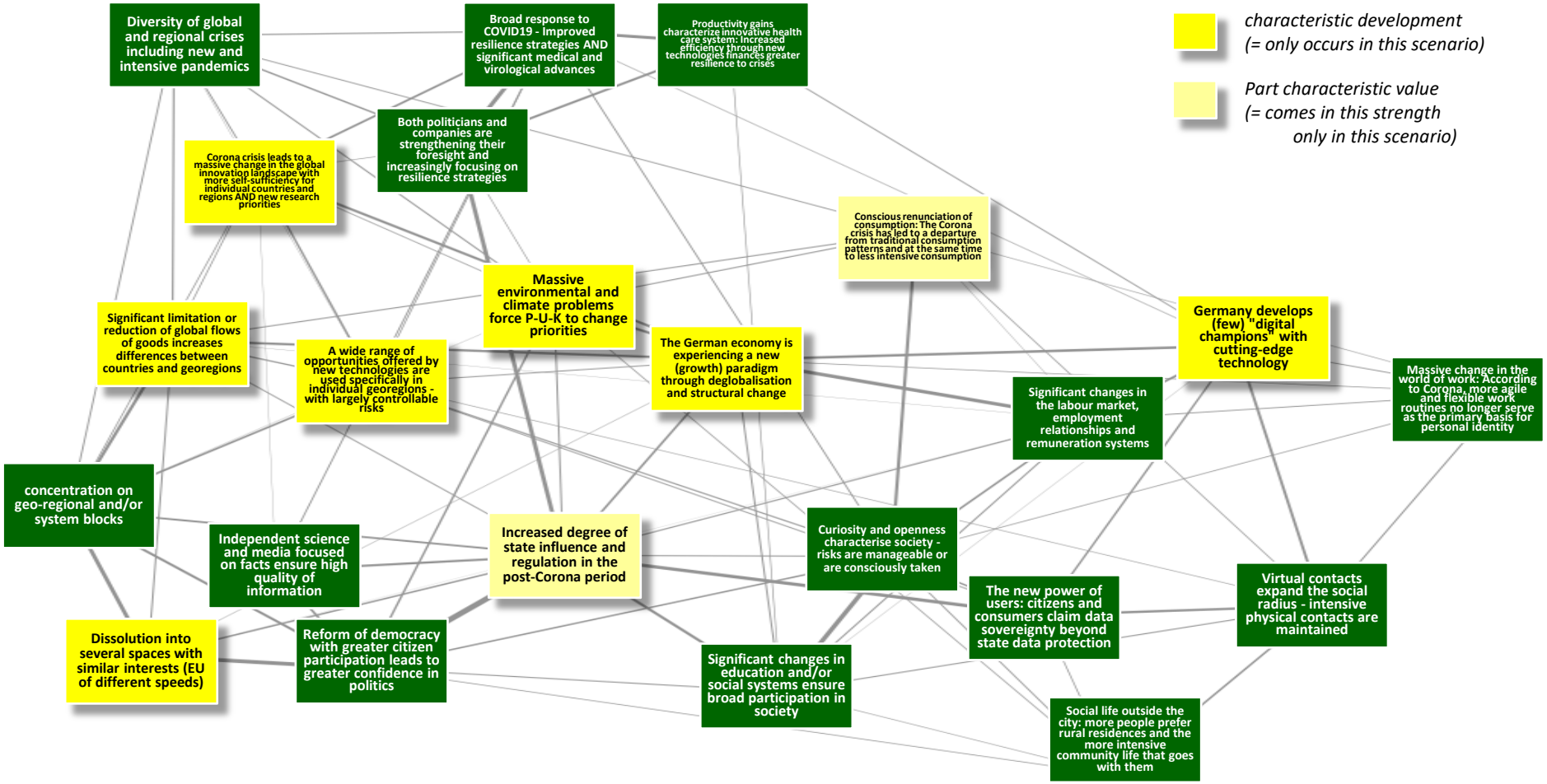
Scenario 3: Farewell to the familiar



Scenario 4: New global dynamics

Fair growth in cooperative structures

- COVID19 has been perceived by all people as a drastic event and has led to a planetary **rethinking. Transnational politics** has become more powerful and has created new framework conditions.
- This has created a **fair free trade system that** has enabled a return to **global economic dynamism.** Germany is benefiting from this new dynamism and is developing into a driver of **structural change**.
- This also includes the fact that Europe, with its focus on open architectures, has become a **leading digital location on a** par with the USA and China.
- This is linked to significant **changes in the labour market**, employment relationships and remuneration systems. In this world, professional success is inextricably linked to the creation of meaning and personal development.
- The strengthened political centre establishes **sustainable resilience strategies**.
- Although new pandemics and crises do exist, they are no longer perceived as threatening in everyday life. Challenges are met with openness and curiosity - the **joy of innovation** dominates.

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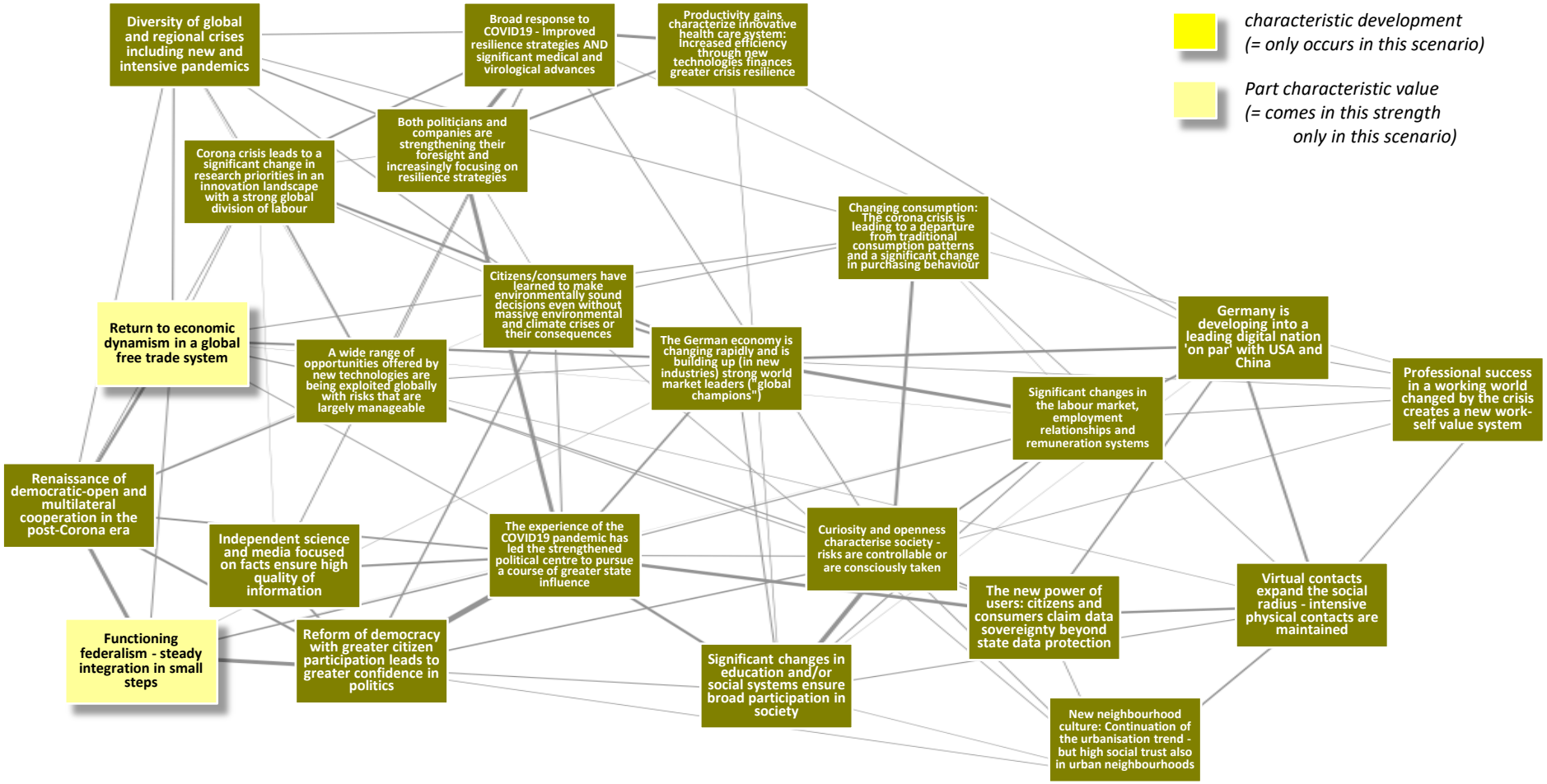
Scenario 4: New global dynamics



Scenario 5: Massive Virtualization

Security and new proximity in connected world

- While the economic consequences of COVID19 were overcome relatively quickly, the pandemic was accompanied by a different **paradigm shift**: **digital services are gaining ground** everywhere in the world, including Germany, and are changing business, working and everyday life.
- This creates an increasingly global awareness; technologies and innovations are developed in **multilateral cooperation.**
- The **EU** profiles itself as a **responsible digital player** and is gaining profile and identity: even the **"United States of Europe"** is no longer a utopia.
- However, the digital transformation is also accompanied by **greater data openness** - but only a few people still talk about monitoring.
- The new digital world also includes new possibilities for fact-based media and leads to a **productive social discourse** overall.
- In everyday life, a lifestyle characterised by risk avoidance is developing, which also contains elements of **social distancing** and prosperity away from cities. The massive **virtualisation of everyday life** is also associated with significantly changed purchasing behaviour.

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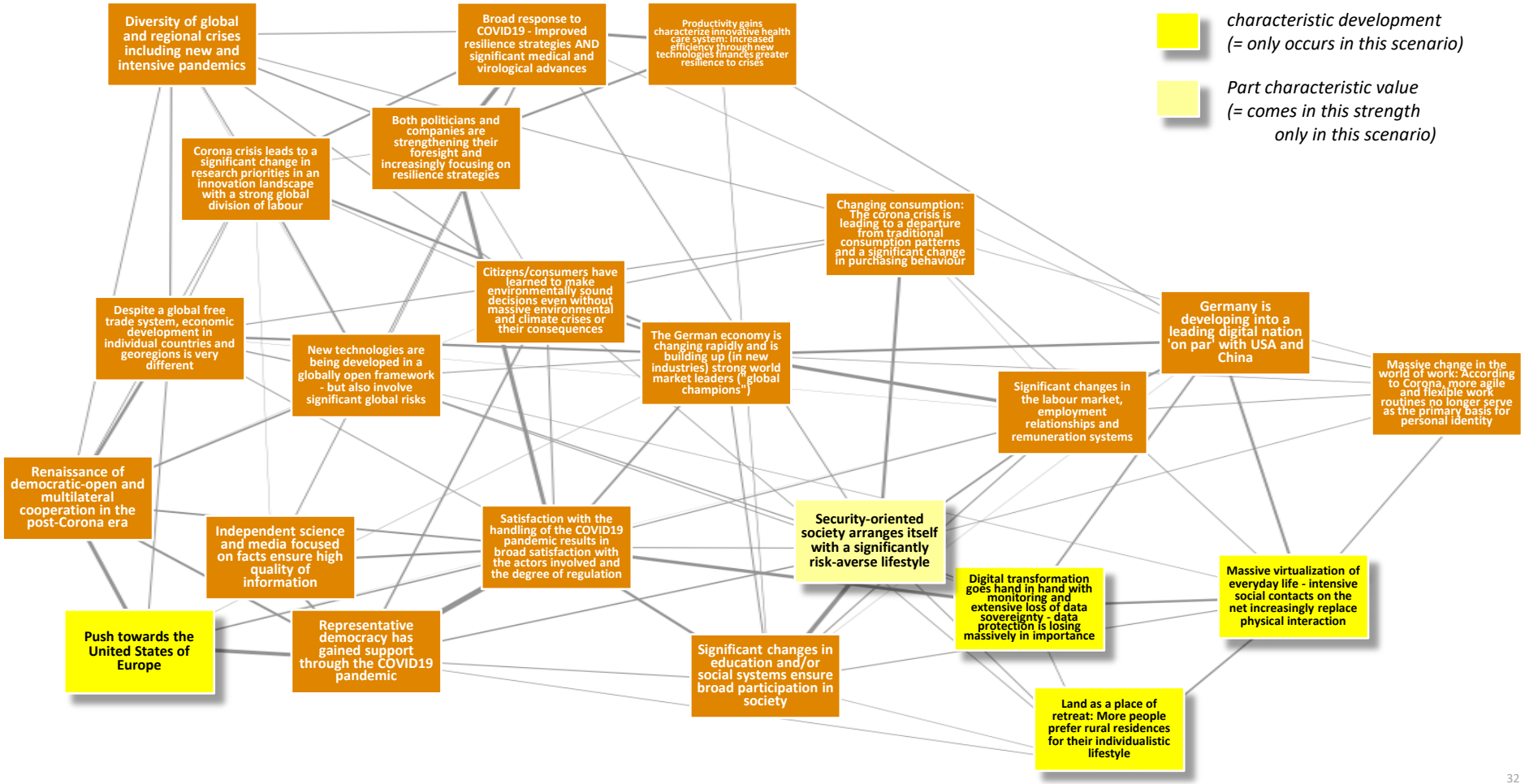
Scenario 5: Massive Virtualization



Scenario 6: In corporate hands

6

Progress at the expense of participation

- The slowdown during the COVID 19 pandemic was followed by a massive **acceleration of the economy and everyday life.** New technologies are being developed in a **highly innovative and globally open system** and **working life is being made massively more flexible**.
- New pandemics can be suppressed at an early stage through medical and biological progress, which makes costly resilience strategies unnecessary.
- World politics is increasingly shaped by **globally oriented and long-term forward-looking companies**, which have gained power over nation states through their innovative strength in the reconstruction years.
- However, economic development varies greatly across the globe and the often privatised education and social systems also **increase disparities** within societies.
- The German economy is experiencing a **surge of innovation**, is changing rapidly and is building up strong **world market leaders**, who in turn are exerting political influence, undermining the role of the weakened state and conjuring up a creeping systemic crisis.
- In everyday life, increasing virtualization serves as a problem solver - but it also has the effect of immobilizing those who can no longer keep up in the accelerated digital world. The end result is often **social isolation**.

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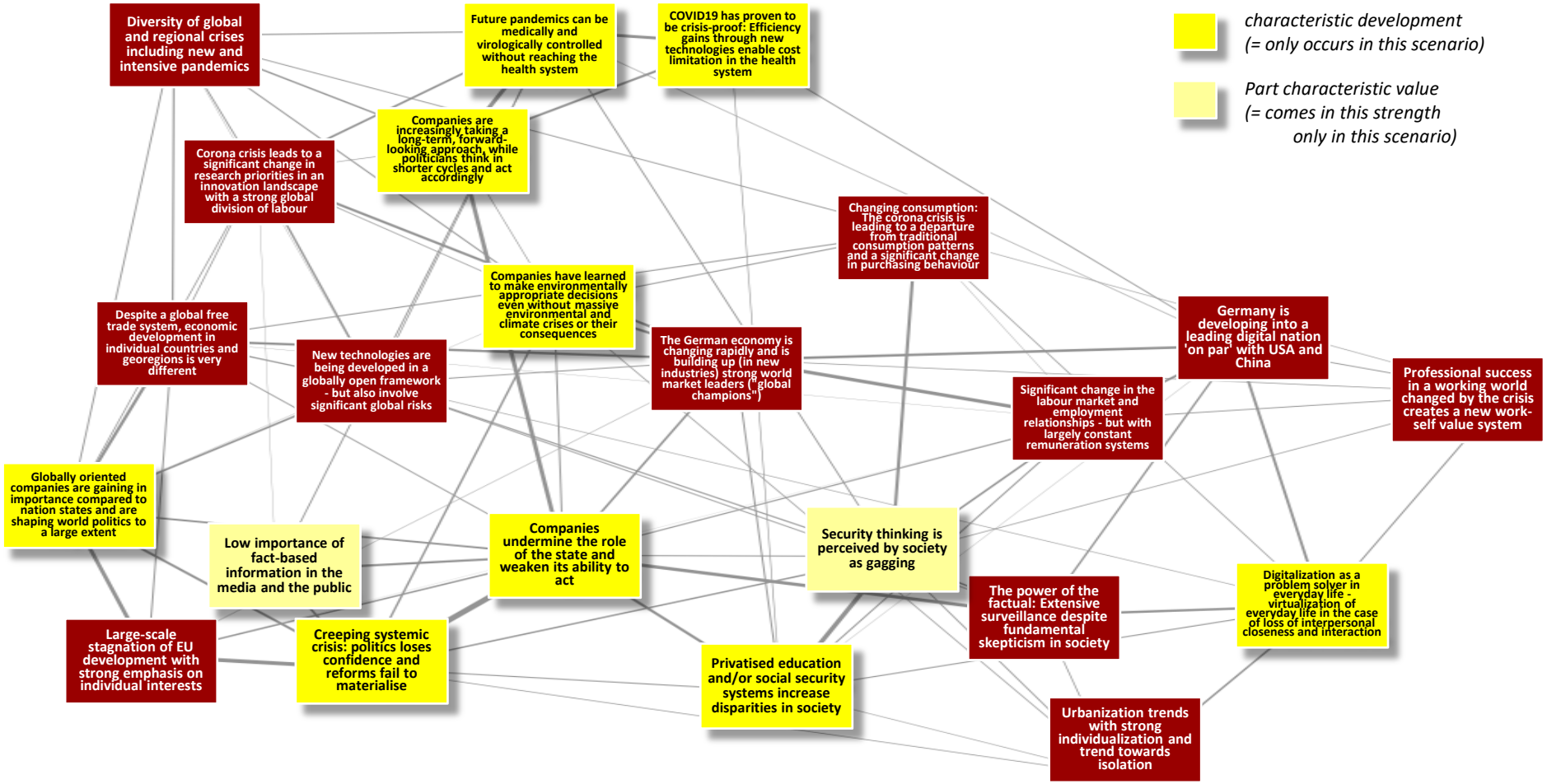
Scenario 6: In corporate hands



Scenario 7: The ongoing crisis

A fertile ground for authoritarian ideas

- Although the health consequences of COVID-19 were quickly overcome, a severe and long-lasting **recession** has occurred worldwide with a sharp **rise in unemployment.**
- At the same time, the rescue measures have intensified the **turn away from global trade** and slowed down global economic growth. The world has disintegrated into **different spheres of influence** that strive for greater self-sufficiency in their technology and innovation policies. The European Union is stagnating and falling behind in the global competition between the georegions. In this **world of diverse crises and conflicts, those** responsible set other priorities than environmental and climate protection.
- The German economy remains despondent and unimaginative in its traditional structures and is losing importance in the global competition between locations. There is less and less scope for investment in R&D - the **ability to innovate is declining structurally.**
- Fact-based media and independent science are finding less and less attention in the **agitated mood democracy.** Thus, destabilization is accompanied by the **desire for a "strong hand policy".**
- Although people perceive the ossified education, social or health systems as unjust, they are **unable to** reach **social agreement on reforms** or necessary resilience strategies in a world dominated by individual interests and the preservation of vested interests. Traditional consumption patterns are defended and the virtualisation of everyday life remains superficial.

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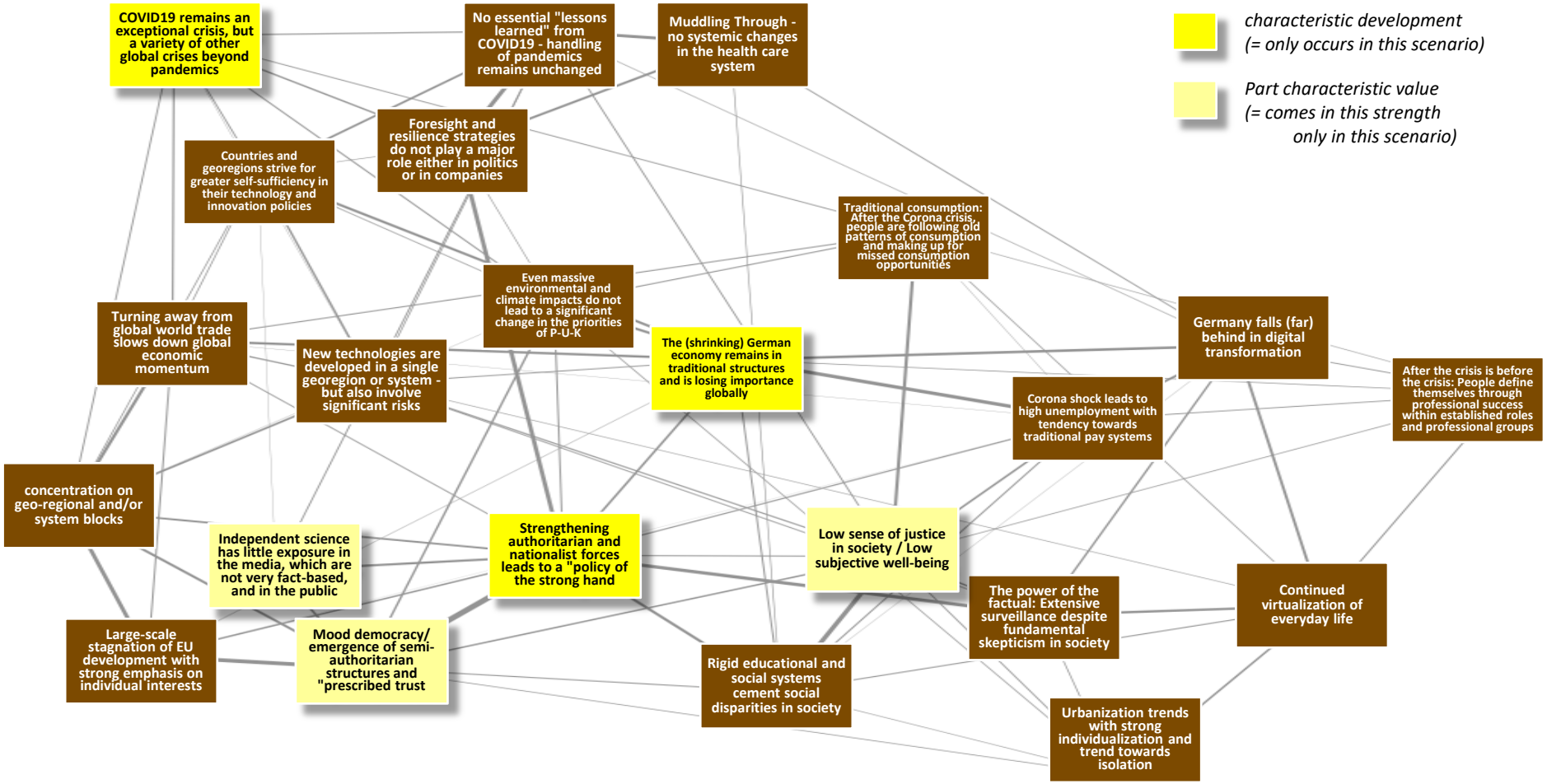
Scenario 7: The ongoing crisis



Scenario 8: Break-up of order

Loss of control and desolidarisation

- COVID-19 has set off an undreamed-of downward spiral worldwide. Already the first severe and prolonged **recession** was accompanied by a sharp **rise in unemployment and a variety of social conflicts.** At the same time, nation states have increasingly closed off their domestic markets, which has exacerbated the global economic crisis and undermined global confidence.
- **Authoritarian and nationalist forces** are gaining ground in world politics. As a result, the global financial system has been destabilized with numerous state bankruptcies and unavoidable debt cuts. Even the **EU** is marked by **severe disintegration.** Those responsible are closing their eyes to the increasingly obvious environmental and climate consequences.
- The German economy, deprived of its export markets, is also caught in the downward spiral, with the result that many weakened companies are being taken over by global competitors.
- Even in the formerly stable Germany, **political events are increasingly being determined by semi-authoritarian forces**, which prevents the implementation of resilience strategies and reforms in the education, social and health care systems. Among people, **uncertainty and an obvious loss of control** lead to a retreat into their cramped, private spaces and comfortable "knowledge bubbles".
- **Social cohesion and common identity are lost**. Everybody fights for his privileges (or those of his clan) in everyday life, with more and more people being left behind in this uninhibited elbow society and having to **restrict** their **consumption**, which keeps the downward spiral going.

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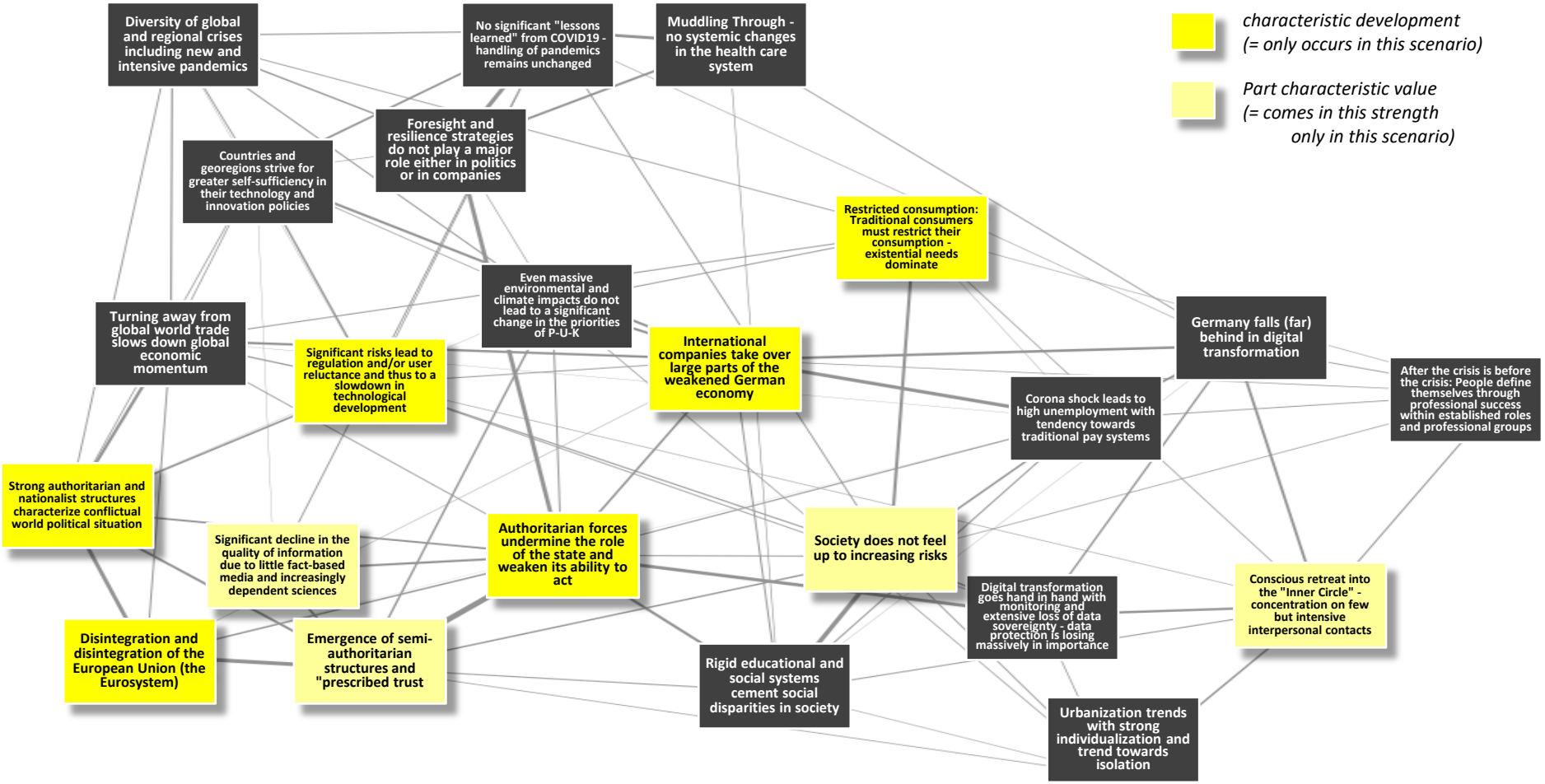
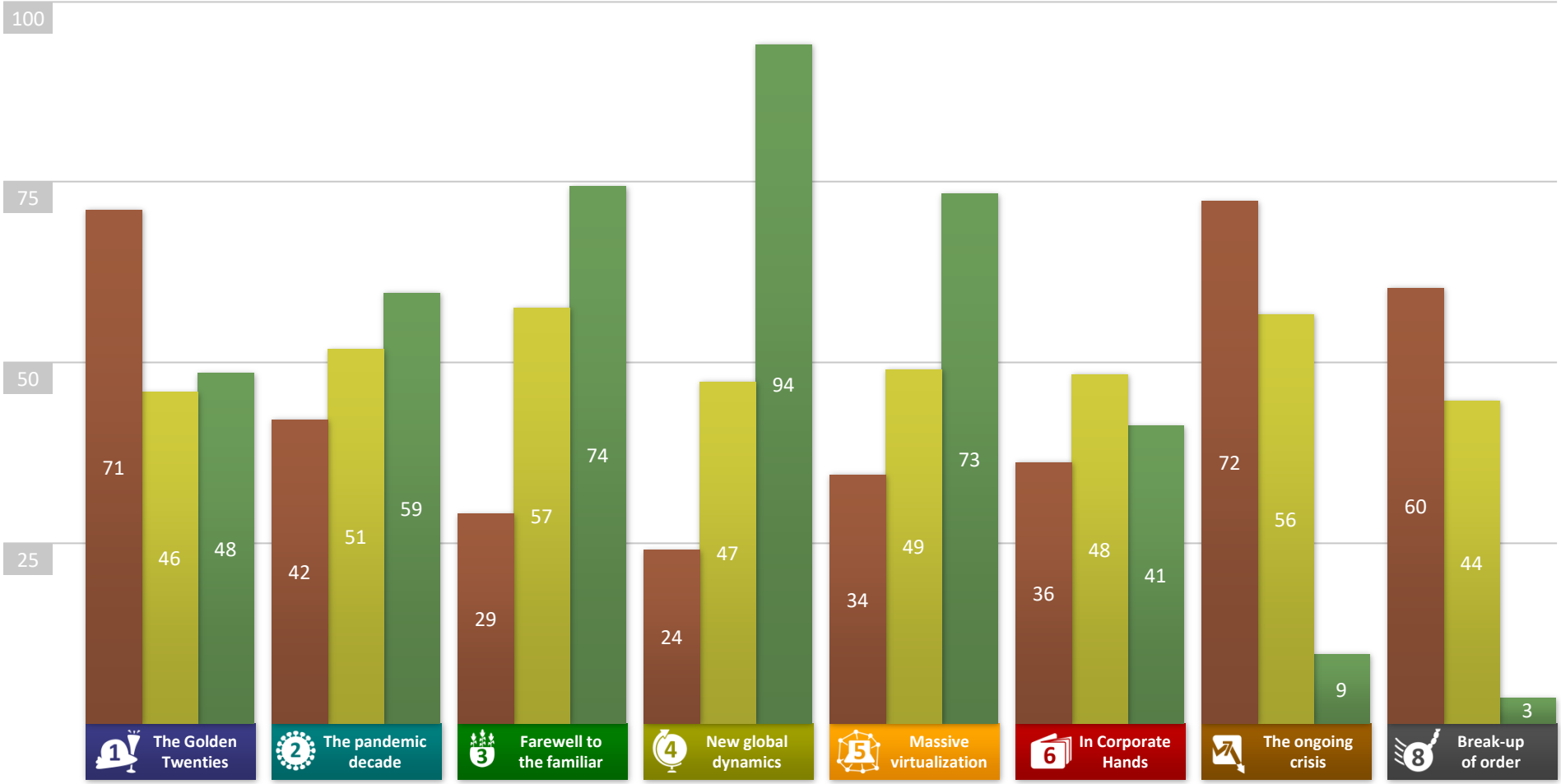
Scenario 8: Break-up of order



Scenario assessment: Total



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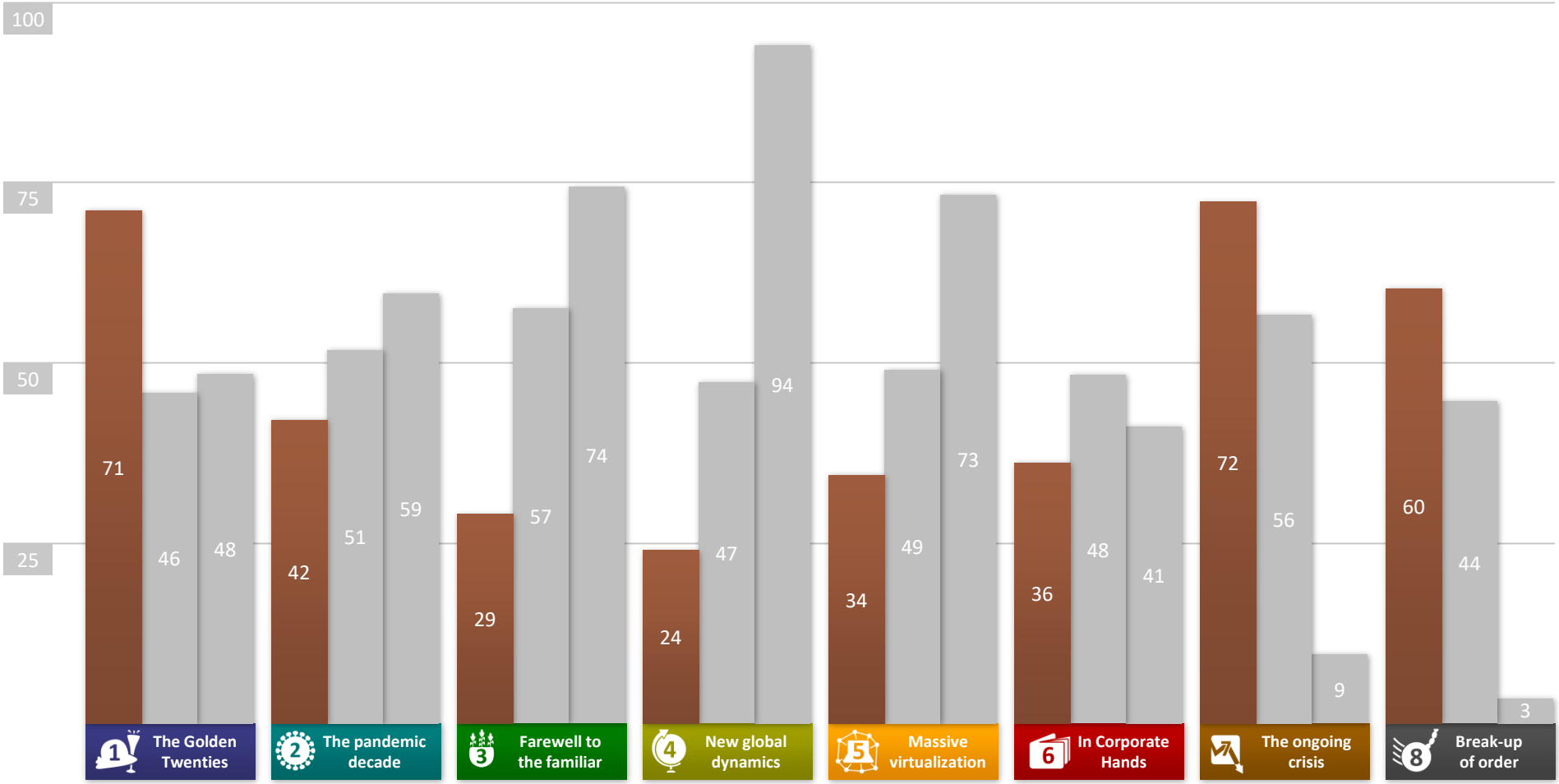
Scenario assessment: proximity to the present



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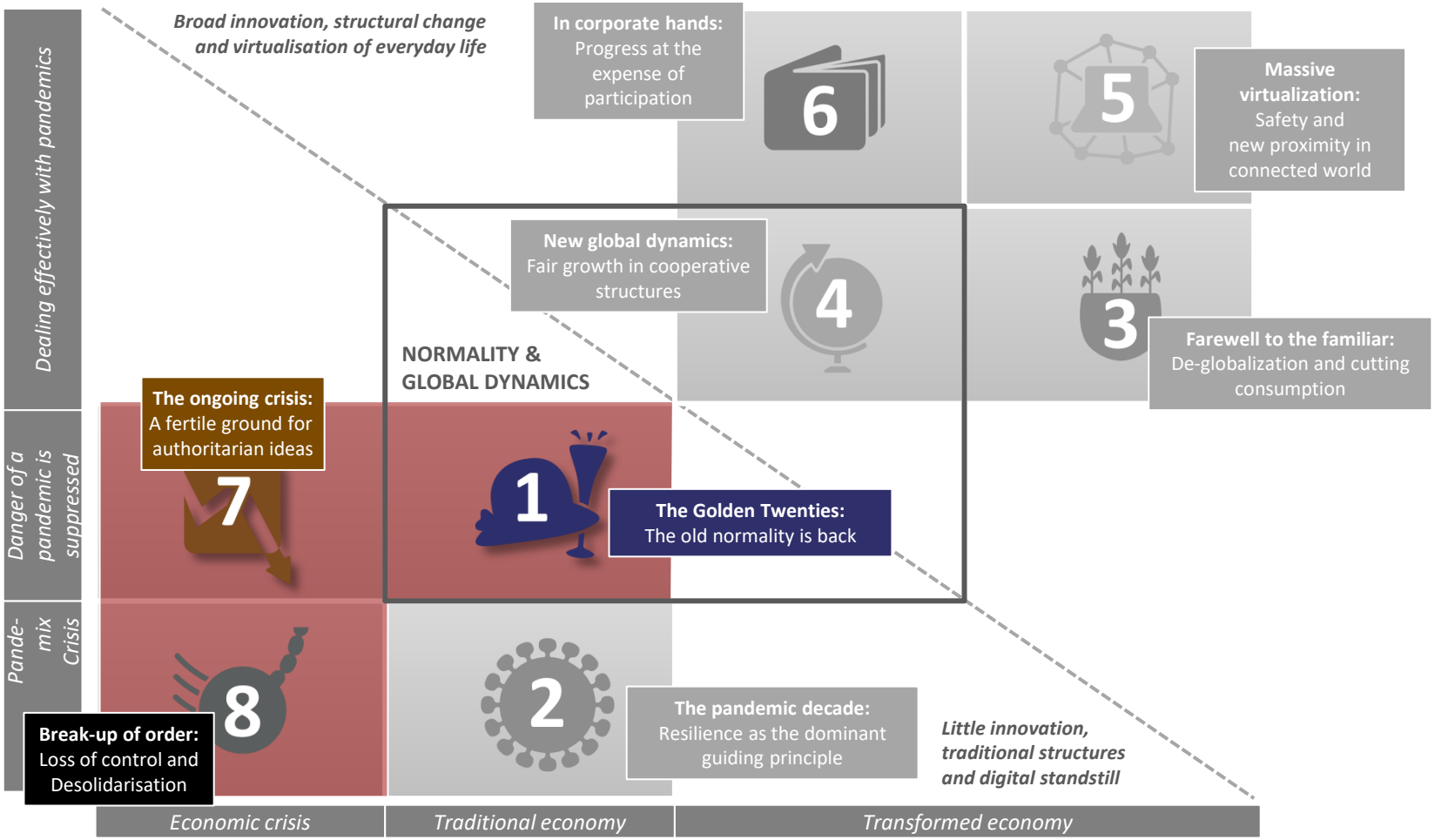
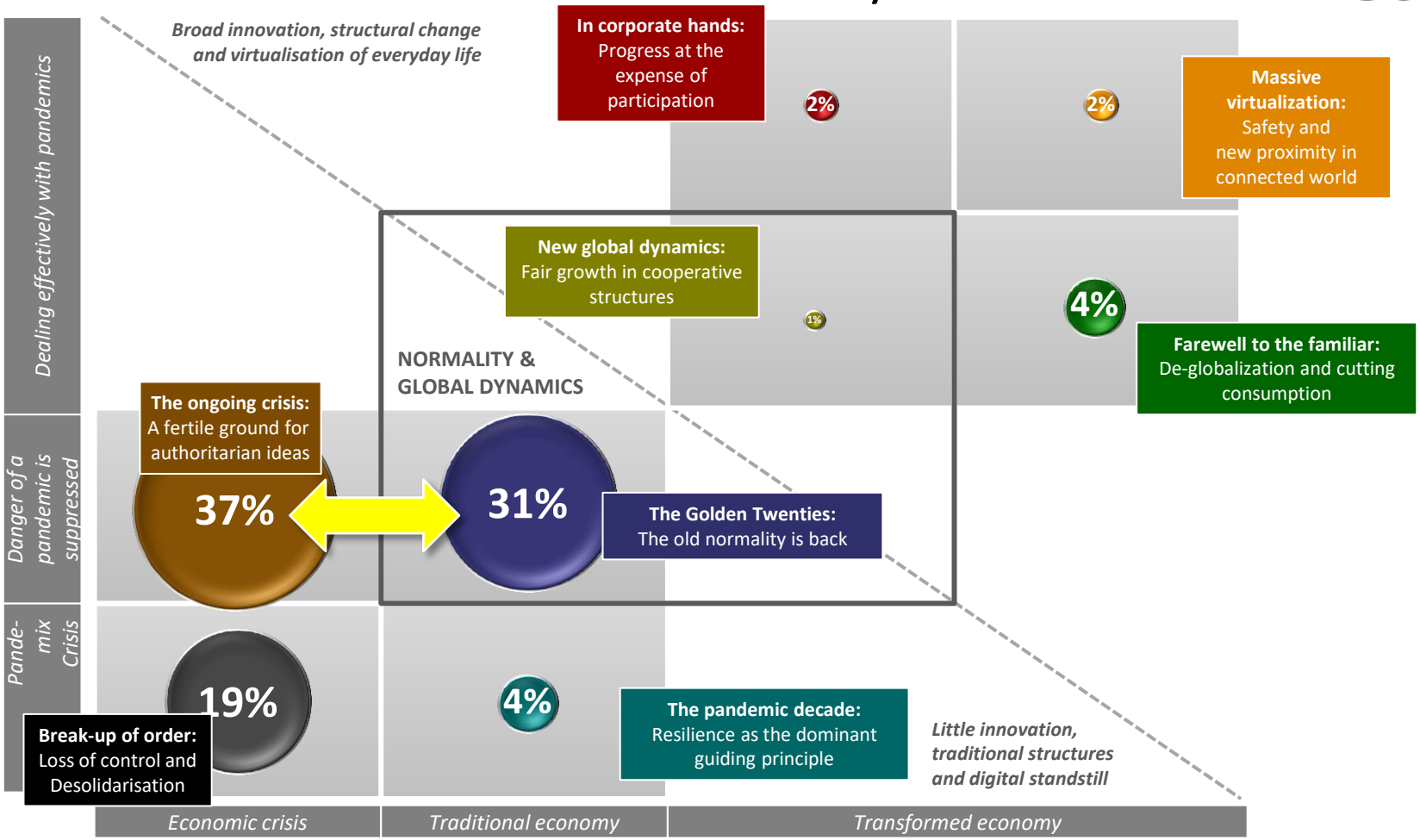
Scenario assessment: Where we stand today ...



Scenario assessment: Where we stand today ...



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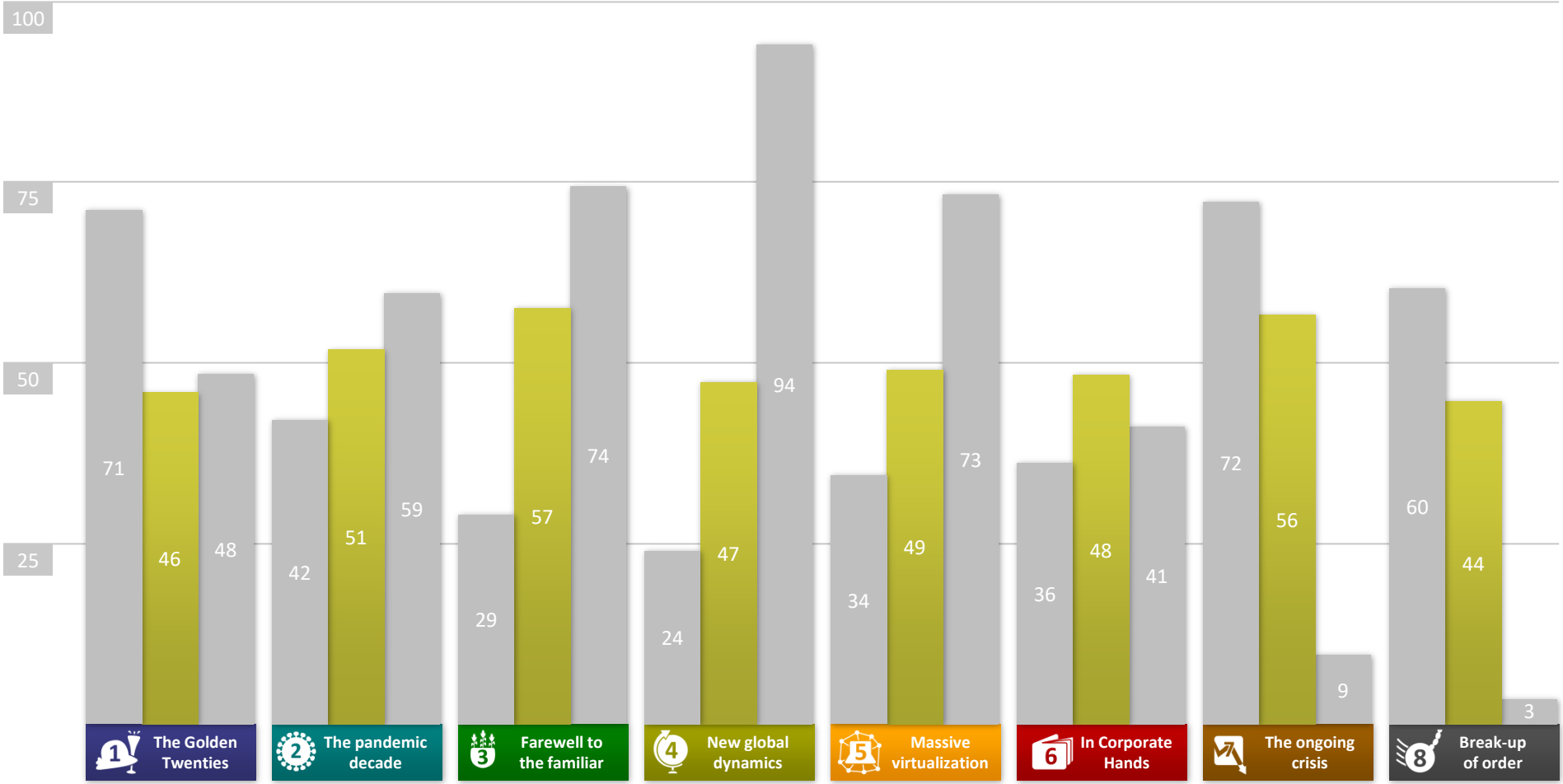
Scenario assessment: Expected future



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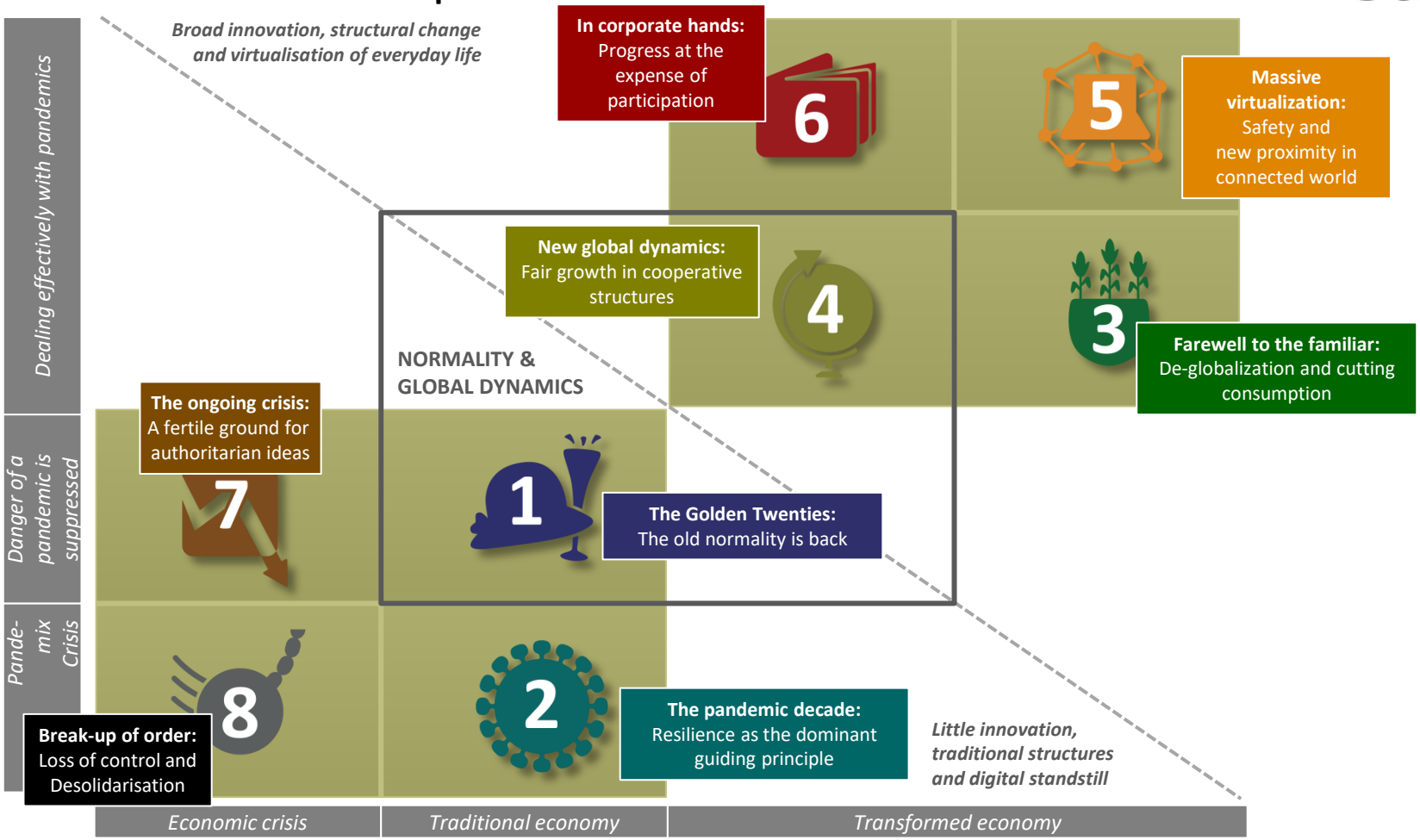
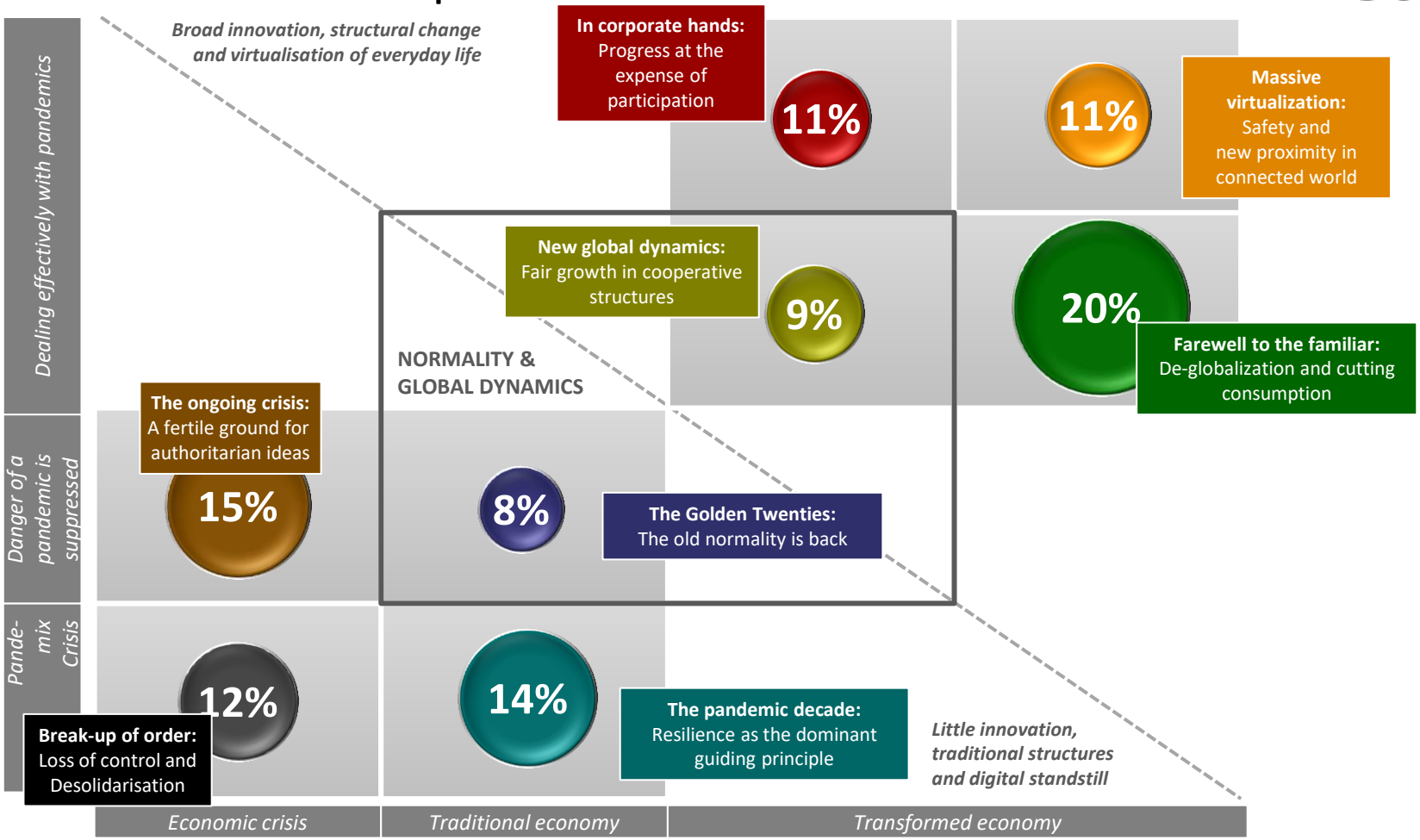
Scenario assessment: Expected future



Scenario assessment: Expected future



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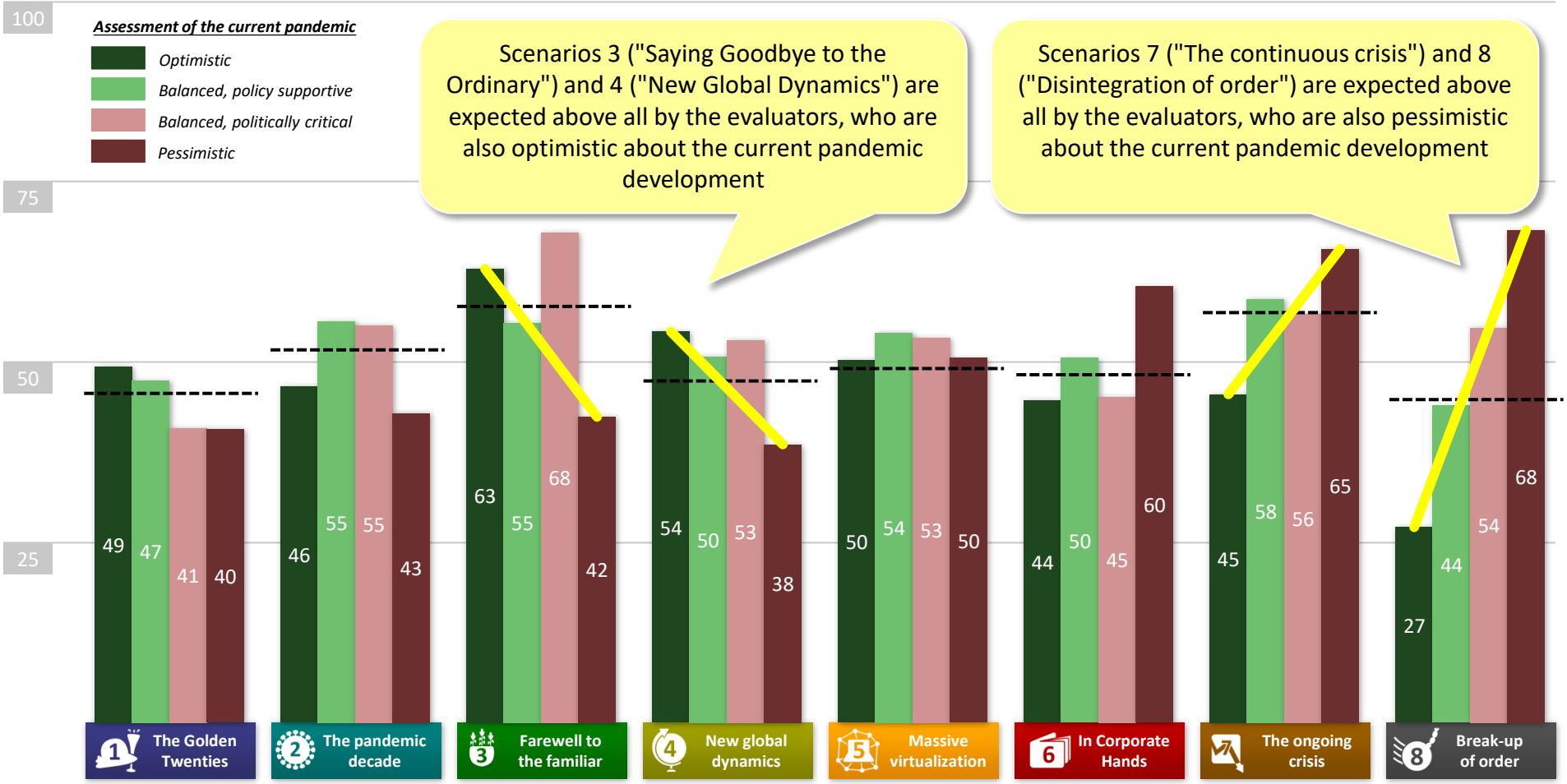
Scenario assessment: Expected future



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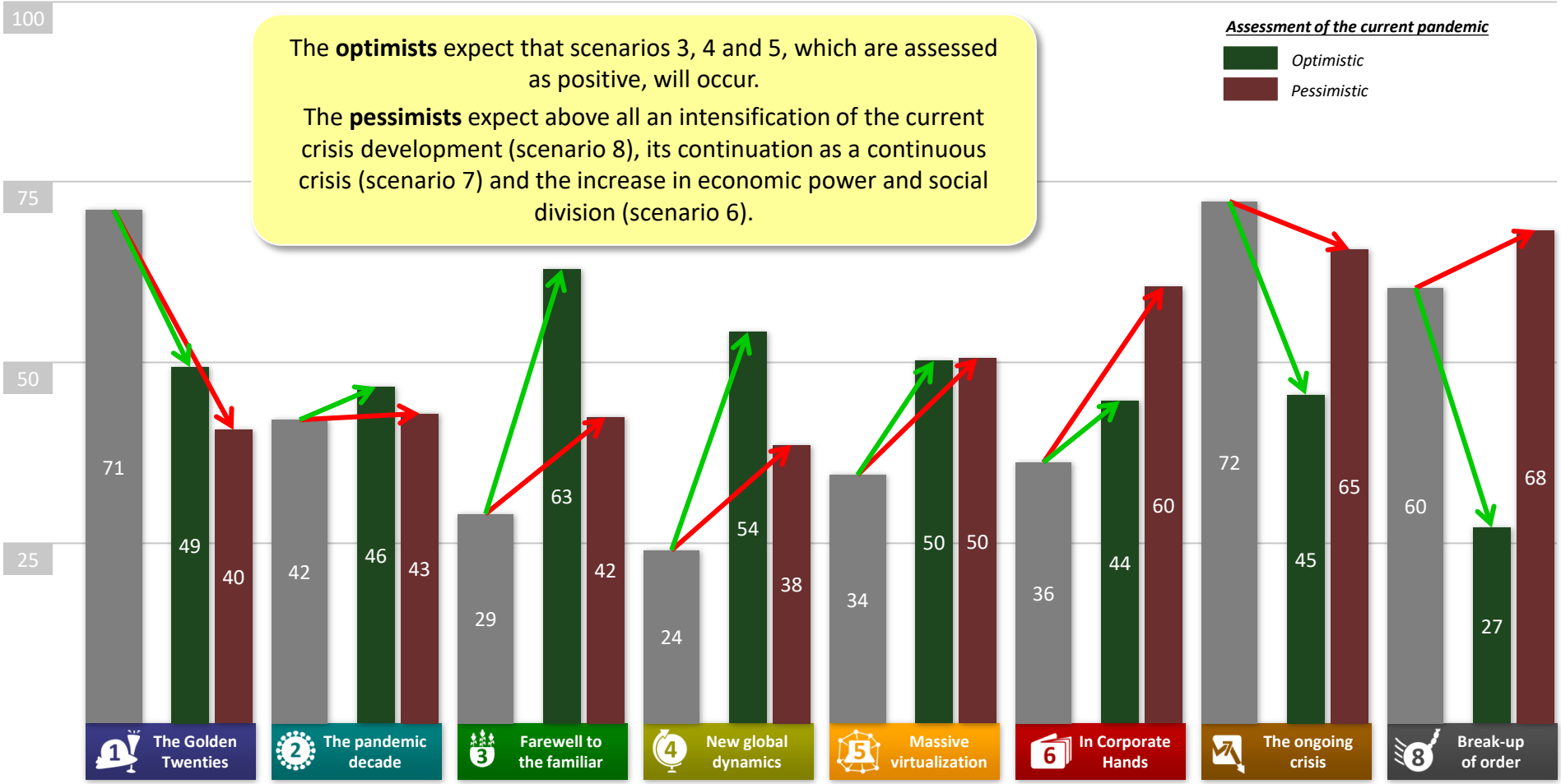
Scenario icons: Target creator

Scenario assessment: Expected future

The **optimists** expect that scenarios 3, 4 and 5, which are assessed as positive, will occur.

The **pessimists** expect above all an intensification of the current crisis development (scenario 8), its continuation as a continuous crisis (scenario 7) and the increase in economic power and social division (scenario 6).



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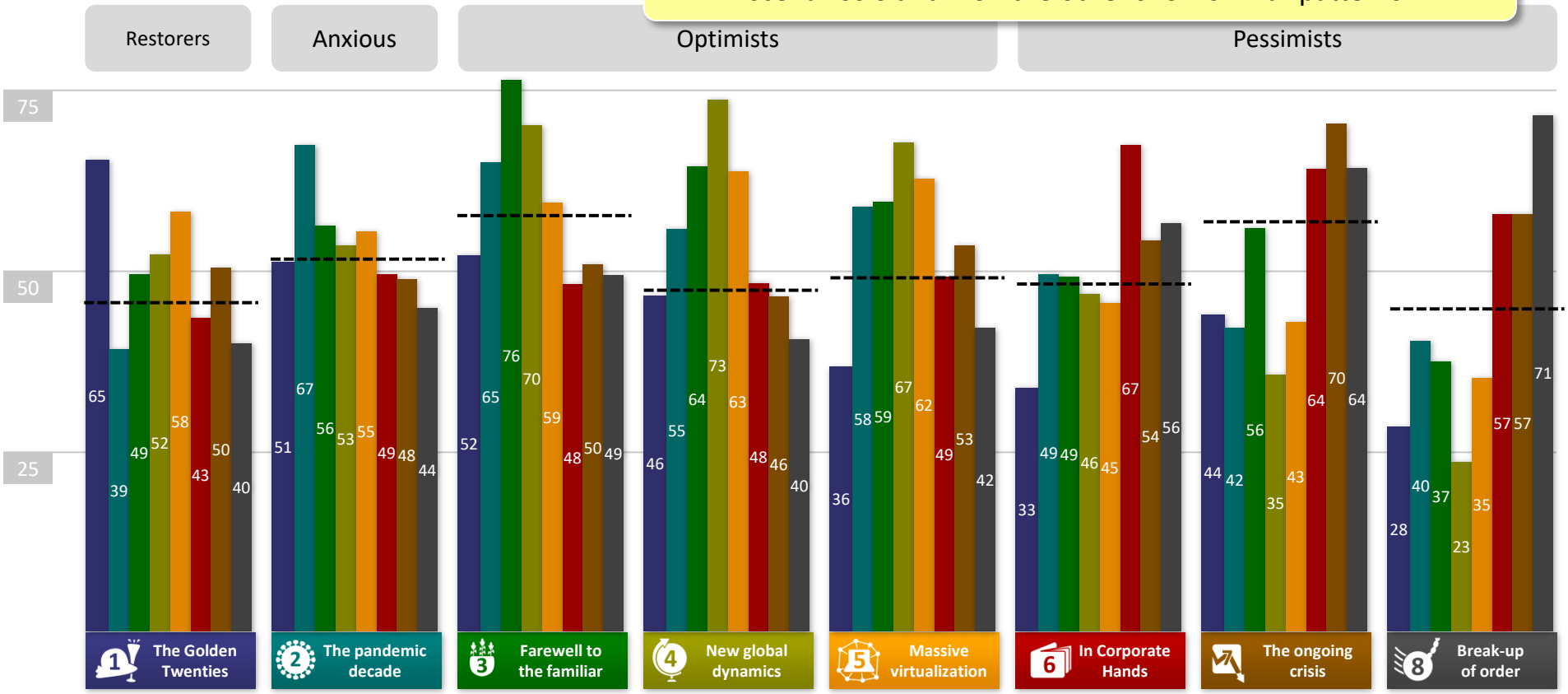
Scenario icons: Target creator

Scenario assessment: Expected future

The colours indicate that the evaluators have indicated the relevant scenario as an expected scenario.

In terms of expectations, scenarios 3, 4 and 5 on the one hand and scenarios 6 and 7 on the other show similar patterns.



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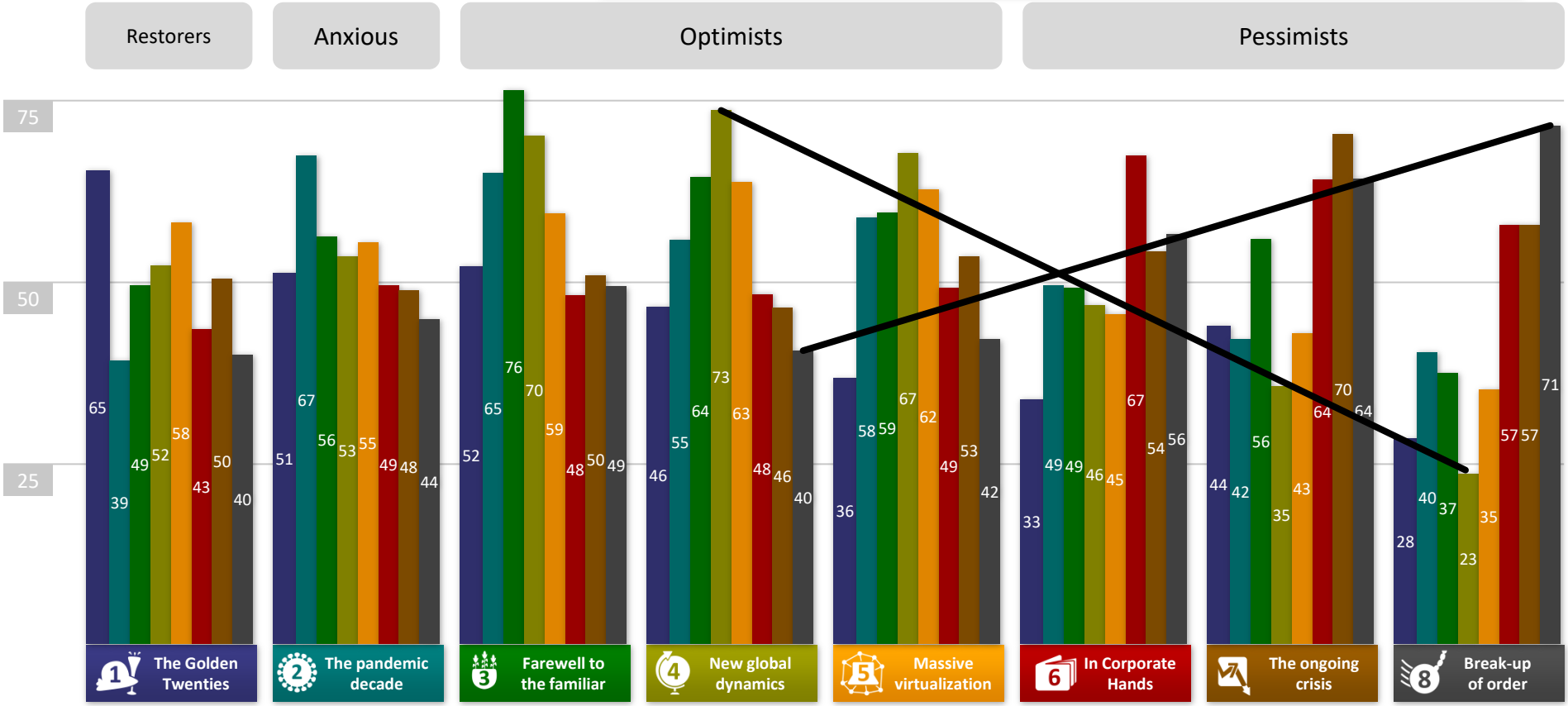
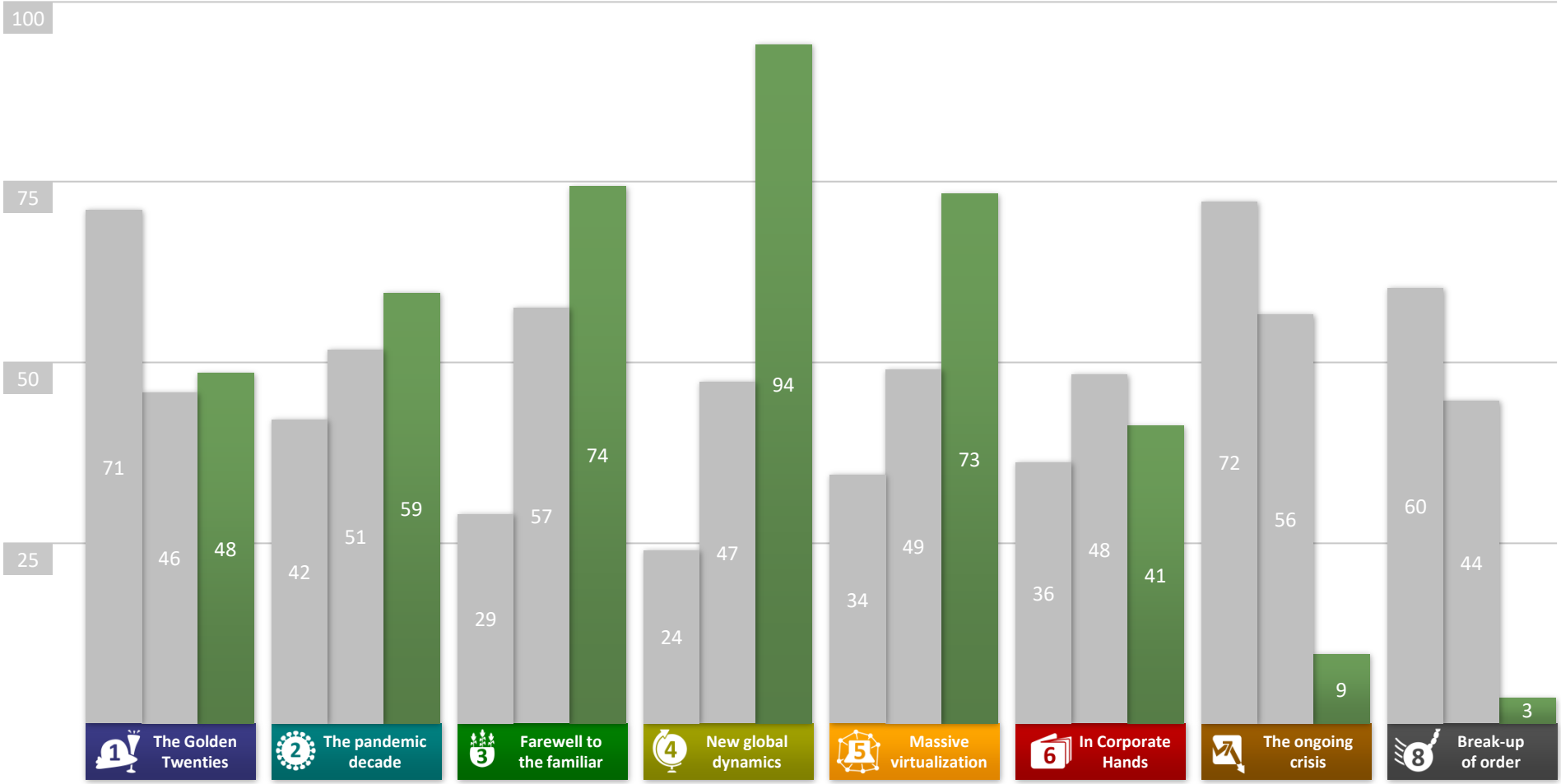
Scenario assessment: Expected future

The colours indicate that the evaluators have indicated the relevant scenario as an expected scenario.

Scenarios 4 and 8 are opposite poles in the expectation of the future



Scenario assessment: Desired future



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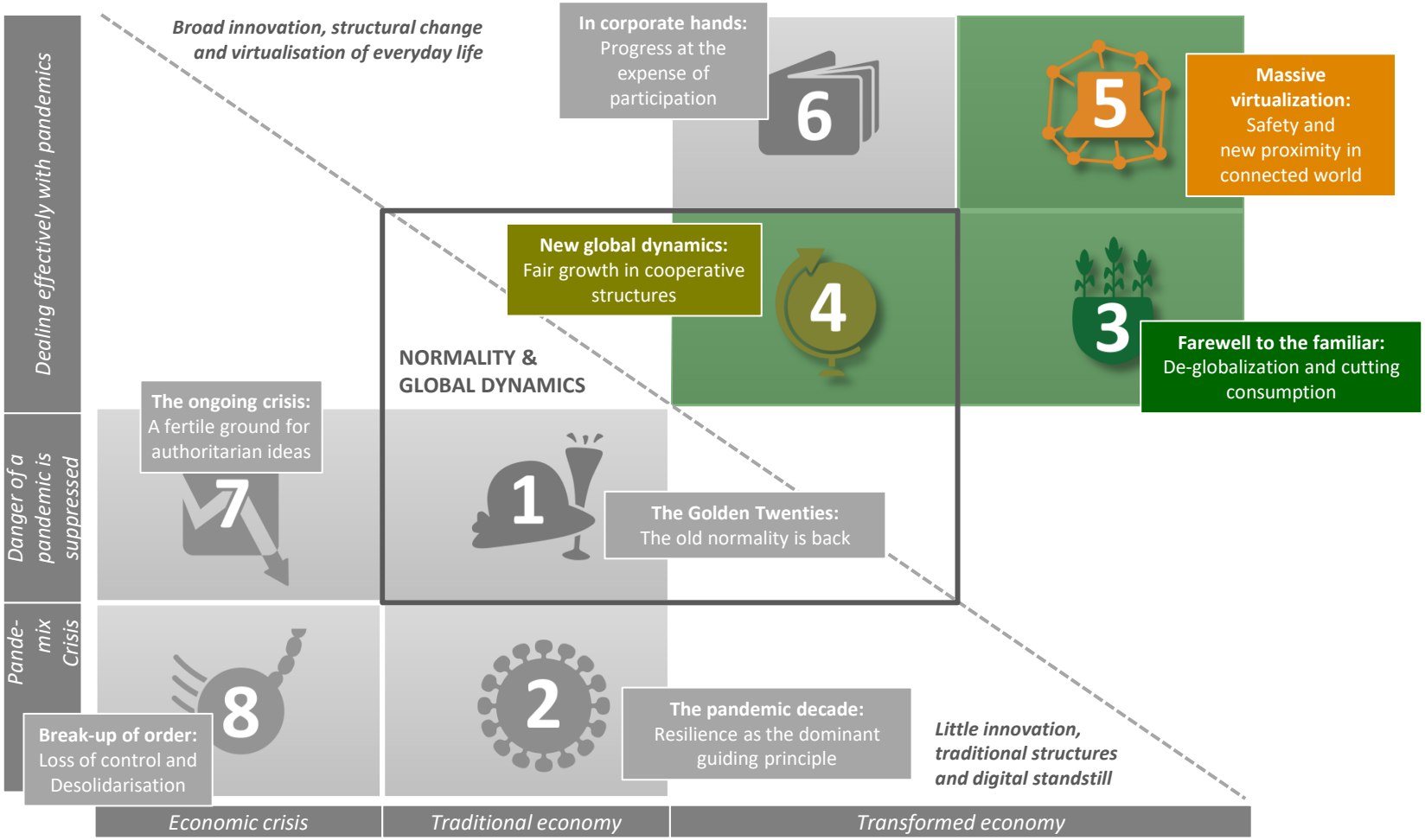
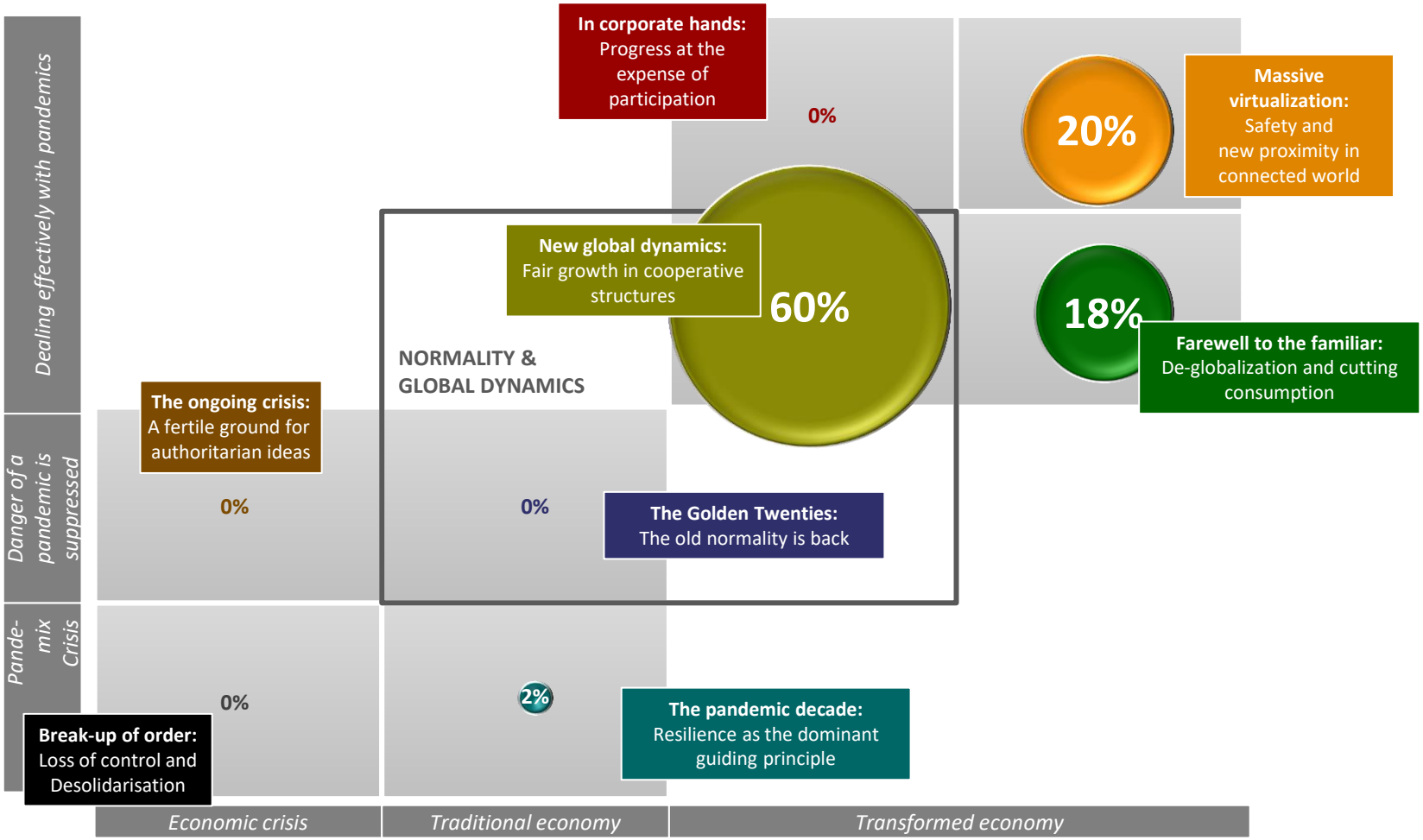
Scenario icons: Target creator

Scenario assessment: Desired future



Scenario assessment: Desired future



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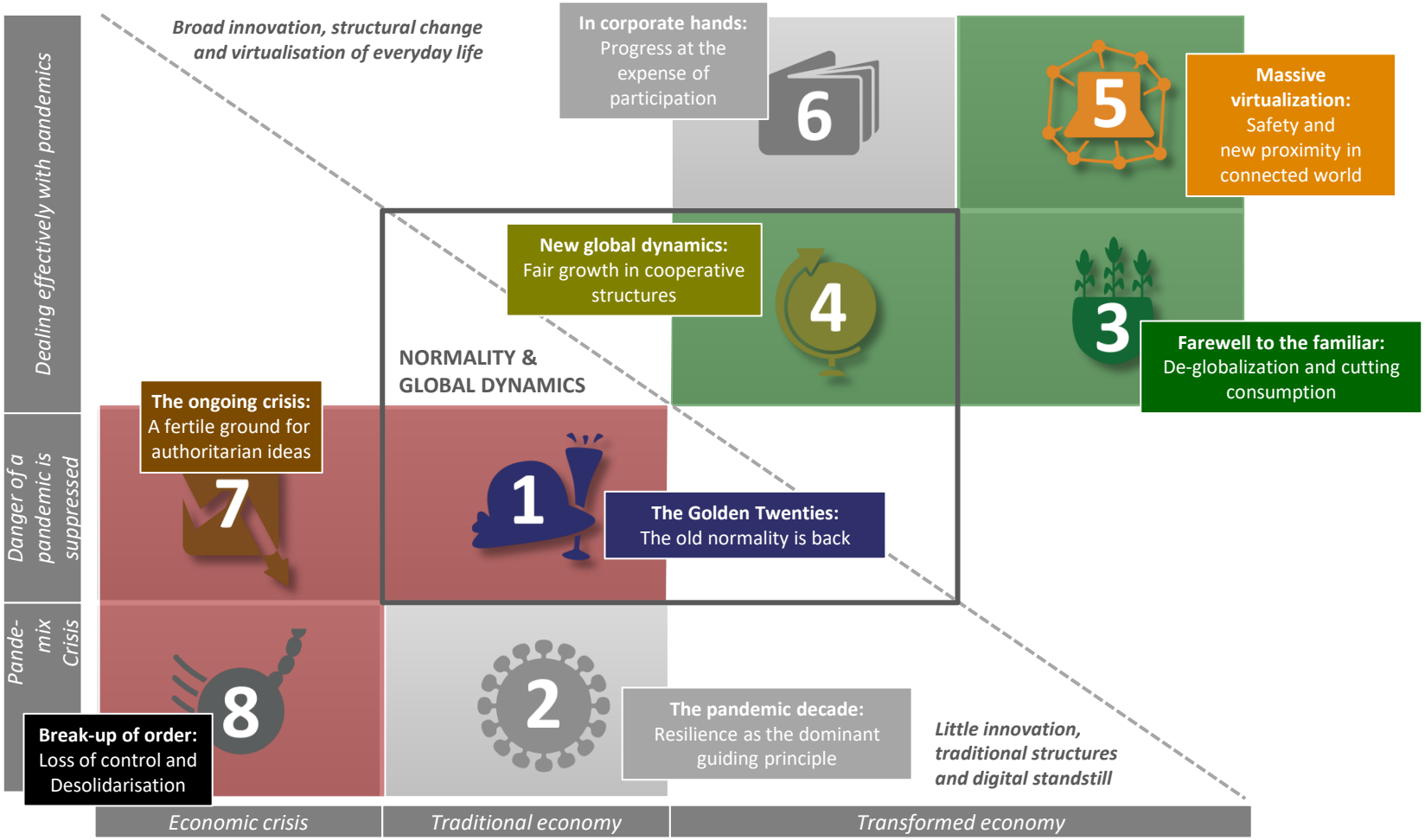
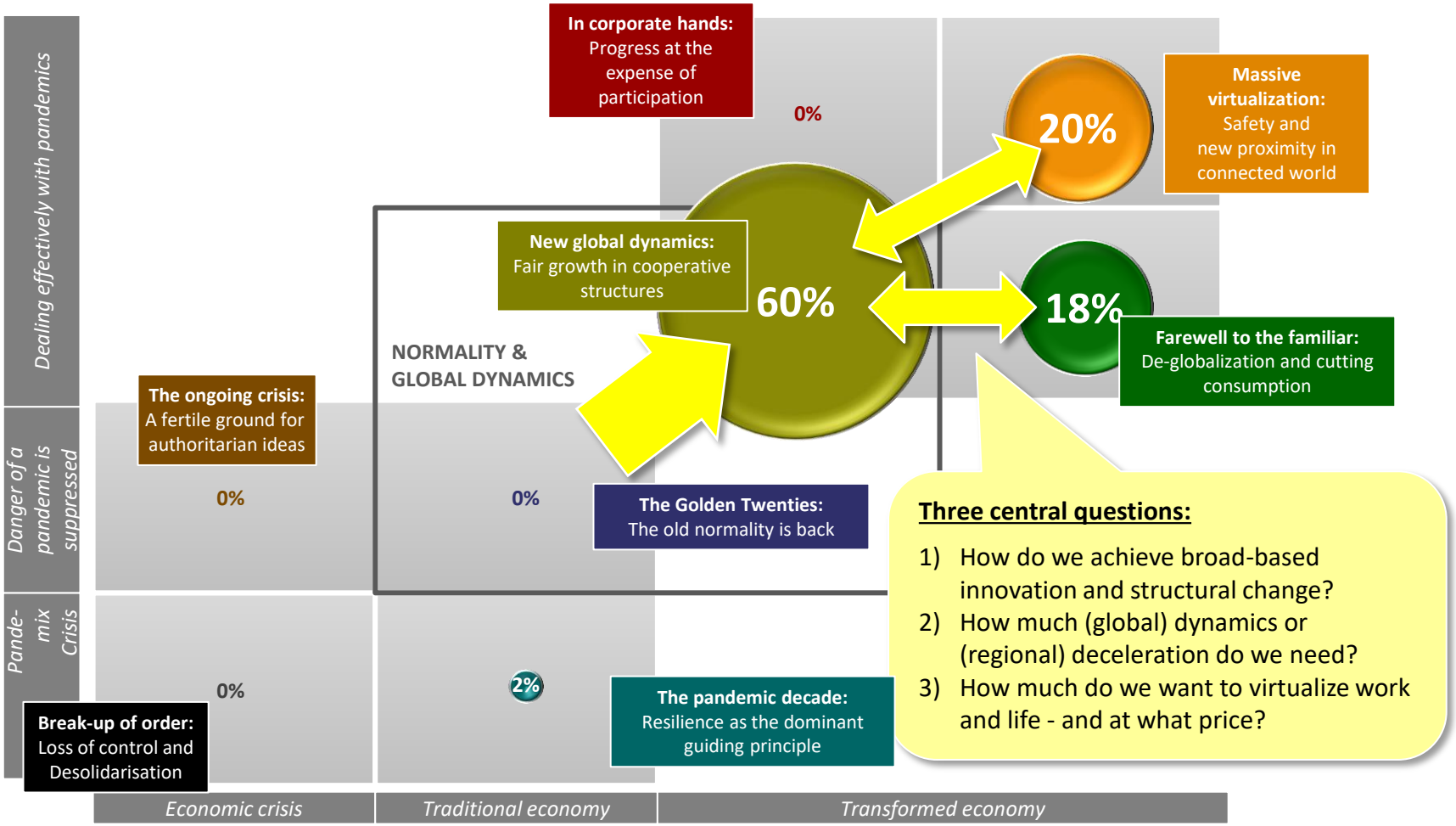
Scenario assessment: Desired transformation



Scenario assessment: Desired transformation



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Post-corona scenarios: Possible uses

The future development of the
Assessing and thinking through the environment

	Consequence analysis	Stress test	Strategy Scenarios
specific Scenarios derive	Develop **own specific environment scenarios** based on the post-corona scenarios.	**Review** existing strategies **against specific environmental scenarios**	Use post-corona scenarios as a **basis for own environment and strategy scenarios.**
individual rate	Individually evaluate post-corona scenarios and derive **consequences for your own actions**.	Use individually evaluated post-corona scenarios to **test the robustness of** your own strategies.	Conceivable reaction to Identify corona in the form of **your own strategy scenarios** and prioritize them with the help of individually assessed post-corona scenarios.
use	Derive **consequences for their own actions** from the post-corona scenarios.	Use the post-corona scenarios to **test the robustness of** your own strategies.	Conceivable reaction to Identify corona in the form of **own strategy scenarios** and prioritize them with the help of post-corona scenarios.

Making your own decisions robust and resilient

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More information:

ScMI AG

ScMI is a corporation for future research and strategic management. As one of the market leaders in the development and implementation of future scenarios, ScMI supports private companies and public organizations in the development of visionary and robust strategies as well as the implementation of scenarios and early warning signals into strategic planning- , innovation and change management processes.

Since its foundation in 1998 ScMI AG has been cooperating with the majority of German Top50-Companies as well as with national and international innovative market leaders and public institutions in the field of Scenario Management. Together with its clients ScMI AG accomplished numerous scenario projects in 17 countries. Furthermore, ScMI permanently refines methodology and its self-developed scenario software to improve quality and efficiency of scenario processes.

ScMI Scenario Management International AG
Klingenderstr 10-14
D-33100 Paderborn / Germany
Phone: +49 5251 150570
Email: info@scmi.de
Homepage: www.scmi.de

Authors

Dr.-Ing. Alexander Fink
CEO
Phone: +49 5251 150572
Email: fink@scmi.de

Hanna Jürgensmeier
Partner
Phone: +49 5251 150581
Email: juergensmeier@scmi.de

Jens-Peter Kuhle
Partner
Phone: +49 5251 150573
Email: kuhle@scmi.de

Sarah Ohse
Consultant
Phone: +49 5251 150585
Email: ohse@scmi.de

Pictures: www.fotolia.com