Online Scenario Process

POST CORONA-SCENARIOS
Society, economy and politics after the Corona crisis

Preliminary documentation
13 May 2020
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
Scenario development: Scenario field analysis

What are the key factors for understanding the economy and society after the Corona crisis?
## Scenario development: Scenario field analysis

### 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 / 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?
Scenario development: scenario field analysis

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

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

Our questions to the future!
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.
Scenario development: Scenario creation

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?
Scenario Interpretation: Scenario Evaluation

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

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
Map of the future

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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
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

The Golden Twenties: The old normality is back

The pandemic decade: Resilience as the dominant guiding principle
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
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

The ongoing crisis: A fertile ground for authoritarian ideas

Break-up of order: Loss of control and desolidarisation
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

Farewell to the familiar: De-globalization and cutting consumption
Map of the future

Massive virtualization: Security and new proximity in connected world

In corporate hands: Progress at the expense of participation

New global dynamics: Fair growth in cooperative structures
Map of the future

1. The pandemic decade: Resilience as the dominant guiding principle
2. Farewell to the familiar: De-globalization and cutting consumption
3. The ongoing crisis: A fertile ground for authoritarian ideas
4. New global dynamics: Fair growth in cooperative structures
5. Massive virtualization: Security and new proximity in connected world
6. In corporate hands: Progress at the expense of participation
7. The Golden Twenties: The old normality is back
8. Break-Up of order: Loss of control and desolidarisation
Map of the future

**Broad innovation, structural change and virtualisation of everyday life**

- **6** In corporate hands: Progress at the expense of participation
- **5** Massive virtualization: Safety and new proximity in connected world
- **4** New global dynamics: Fair growth in cooperative structures
- **3** Farewell to the familiar: De-globalization and cutting consumption

**NORMALITY & GLOBAL DYNAMICS**

- **1** The Golden Twenties: The old normality is back
- **2** The pandemic decade: Resilience as the dominant guiding principle
- **7** The ongoing crisis: A fertile ground for authoritarian ideas
- **8** Break-up of order: Loss of control and Desolidarisation

**Economic crisis** | **Traditional economy** | **Transformed economy**
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**Pandemic vs. OTHER CRISIS**

**COMMERCE AND ACCELERATION vs. WAIVED AND DECELERATION**
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.
Scenario 1: The Golden Twenties

Moderate crisis development - COVID19 pandemic as an exceptional global crisis

No essential "lessons learned" from COVID19 - handling of pandemics remains unchanged

Muddling Through - no systemic changes in the health care system

Foresight and resilience strategies do not play a major role either in politics or in companies

Environmental and climate problems remain rather abstract for Germany (DACH) - P-U-R see no need to change their priorities

No significant change in the global technology and innovation landscape

Dynamic development of the world economy in a global free trade system - albeit with differences in individual countries and geo-regions

A wide range of opportunities offered by new technologies are being exploited globally with risks that are largely manageable

The German economy is reinventing itself in its key industries and further expanding its position as the world’s leading exporter

High importance of fact-based information in the media and public

SATISFACTION with the handling of the COVID19 pandemic, results in broad satisfaction with the actors involved and the degree of regulation

High importance and rigour of data protection (policy)

New normality is close to the old normality: hardly any change in attitude to life

Traditional consumption: After the Corona crisis, people are following old patterns of consumption and making up for missed consumption opportunities

Traditional educational and social systems are guarantors for a high overall participation in society

Continuous development of the EU with uneven steps towards more or less integration

Representative democracy has gained support through the COVID19 pandemic

Satisfaction with the handling of the COVID19 pandemic, results in broad satisfaction with the actors involved and the degree of regulation

New neighbourhood culture: Continuation of the urbanisation trend - but high social trust also in urban neighbourhoods

Largely constant development of the labour market

Germany falls (far) behind in digital transformation

After the crisis is before the crisis: People define themselves through professional success within established roles and professional groups

Return to physical contacts - virtual contacts play a minor role in everyday life

High importance and rigour of data protection (policy)

High importance and rigour of data protection (policy)
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.
Scenario 2: The pandemic decade

- COVID19 was only the starting point - Epidemics and pandemics as a central long-term crisis topic

- Health systems, politics and society will be geared to dealing with possible pandemics much better than before

- Structural changes create more crisis resilience - but also increase the costs of the health care system

- High importance of resilience strategies of the public sector

- Environmental and climate problems remain rather abstract for Germany (DACH) - PU-U see no need to change their priorities

- Sustained slumps and low global economic momentum despite largely free trade system

- A wide range of opportunities offered by new technologies are being exploited globally with risks that are largely manageable

- The German economy is re-inventing itself in its key industries and further expanding its position as the world’s leading exporter

- Germany falls (far) behind in digital transformation

- Continuous development of the EU with uneven steps towards more or less integration

- Independent science and media focused on facts ensure high quality of information

- The experience of the COVID19 pandemic has led the strengthened political centre to pursue a course of greater state influence

- Reform of democracy with greater citizen participation leads to greater confidence in politics

- Traditional educational and social systems are guarantors for a high overall participation in society

- High sense of justice in society / High subjective well-being

- People would like to use more possibilities of digital transformation - but are prevented from doing so by restrictive data protection

- Social life outside the city: more people prefer rural residences and the more intensive community life that goes with them

- Return to physical contacts - virtual contacts play a minor role in everyday life

- People increasingly no longer define themselves through their (inflexible and less agile) professional work

- Characteristic development (= only occurs in this scenario)

- Part characteristic value (= comes in this strength only in this scenario)
### 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.
Scenario 3: Farewell to the familiar

- Diversity of global and regional crises including new and intensive pandemics
- Broad response to COVID-19: Improved resilience strategies AND significant medical and virological advances
- Productivity gains, characteristic innovative health and efficient through new technologies through greater resilience to crisis
- Both politicians and companies are strengthening their foresight and increasingly focusing on resilience strategies
- Massively environmental and climate problems force P-U-K to change priorities
- A wide range of opportunities offered by new technologies are used specifically in individual georegions with largely controllable risks
- Concentration on geo-regional and/or system blocks
- Significant limitation or reduction of global flows of goods increases differences between countries and georegions
- Dissolution into several spaces with similar interests (EU of different speeds)
- Independent science and media focused on facts ensure high quality of information
- Increased degree of state influence and regulation in the post-Corona period
- The German economy is experiencing a new (growth) paradigm through deglobalisation and structural change
- The new power of users: citizens and consumers claim data sovereignty beyond state data protection
- Curiosity and openness characterise society - risks are manageable or are consciously taken
- Social life outside the city: more people prefer rural residences and the more intensive community life that goes with them
- Reform of democracy with greater citizen participation leads to greater confidence in politics
- Significant changes in education and/or social systems ensure broad participation in society
- Virtual contacts expand the social radius - intensive physical contacts are maintained
- Significant changes in the labour market, employment relationships and remuneration systems
- Germany develops (few) "digital champions" with cutting-edge technology
- Massively change in the world of work: According to Corona, more agile and flexible work routines no longer serve as the primary basis for personal identity
- Corona crisis leads to a massive change in the global innovation landscape with more uncertainties for traditional georegions AND new research priorities
- Conscious renunciation of consumption: the Corona crisis has led to a departure from traditional consumption patterns with more emphasis on less intensive consumption
- Significant changes in the labour market, employment relationships and remuneration systems
- Germany develops (few) "digital champions" with cutting-edge technology
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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.
Scenario 4: New global dynamics

Diversity of global and regional crises including new and intensive pandemics

Broad response to COVID19: improved resilience strategies AND significant medical and virological advances

Productivity gains characterize innovative health care system: increased efficiency through new technologies finances greater crisis resilience

Corona crisis leads to a significant change in research priorities in an innovation landscape: with a strong global division of labour

Both politicians and companies are strengthening their foresight and increasingly focusing on resilience strategies

Citizens/consumers have learned to make environmentally sound decisions even without massive environmental and climate crises or their consequences

Renaissance of democratic-open and multilateral cooperation in the post-Corona era

Return to economic dynamism in a global free trade system

A wide range of opportunities offered by new technologies are being exploited globally with risks that are largely manageable

The German economy is changing rapidly and is building up (in new industries) strong world market leaders ("global champions")

Functioning federalism - steady integration in small steps

Independent science and media focused on facts ensure high quality of information

Reform of democracy with greater citizen participation leads to greater confidence in politics

The experience of the COVID19 pandemic has led the strengthened political centre to pursue a course of greater state influence

Curiosity and openness characterise society - risks are controllable or are consciously taken

Significant changes in the labour market, employment relationships and remuneration systems

Significant changes in education and or social systems ensure broad participation in society

Changing consumption: The corona crisis is leading to a departure from traditional consumption patterns and a significant change in purchasing behaviour

The new power of users; citizens and consumers claim data sovereignty beyond state data protection

Significant changes in the labour market, employment relationships and remuneration systems

Virtual contacts expand the social radius - intensive physical contacts are maintained

New neighbourhood culture: Continuation of the urbanisation trend - but high social trust also in urban neighbourhoods

Characteristic development

(= only occurs in this scenario)

Part characteristic value

(= comes in this strength only in this scenario)
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.
Scenario 5: Massive Virtualization

- Diversity of global and regional crises including new and intensive pandemics
- Corona crisis leads to a significant change in research priorities in an innovation landscape with a strong global division of labour
- Despite a global free trade system, economic development in individual countries and georegions is very different
- New technologies are being developed in a globally open framework but also involve significant global risks
- The German economy is changing rapidly and is building up (in new industries) strong world market leaders ("global champions")
- Germany is developing into a leading digital nation ‘on par’ with USA and China
- Push towards the United States of Europe
- Land as a place of retreat: More people prefer rural residences for their individualistic lifestyle

- Broad response to COVID19 - improved resilience strategies AND significant medical and virological advances
- Both politicians and companies are strengthening their foresight and increasingly focusing on resilience strategies
- The German economy is changing rapidly and is building up (in new industries) strong world market leaders ("global champions")
- Germany is developing into a leading digital nation ‘on par’ with USA and China
- Push towards the United States of Europe
- Land as a place of retreat: More people prefer rural residences for their individualistic lifestyle

- Productivity gains, changes in consumer health and medicine, increased digital resilience to crises
- Citizens/consumers have learned to make environmentally sound decisions even without massive environmental and climate crises or their consequences
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-Changing consumption: The COVID19 crisis is leading to a reduction from traditional consumption patterns and a significant change in purchasing behaviour
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- Security-oriented society arranges itself with a significantly risk-averse lifestyle
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- Significant changes in the labour market, employment relationships and remuneration systems
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- Digital transformation goes hand in hand with monitoring and extensive loss of data sovereignty - data protection is losing massively in importance
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- Massive virtualization of everyday life - intensive social contacts on the net increasingly replace physical interaction
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- Independent science and media focused on facts ensure high quality of information
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- Representative democracy has gained support through the COVID19 pandemic
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- Master of science for companies in the post-Corona era
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- Characteristic development (= only occurs in this scenario)
- Part characteristic value (= comes in this strength only in this scenario)
Scenario 6: In corporate hands

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.
Scenario 6: In corporate hands

- Diversity of global and regional crises including new and intensified pandemics
- Corona crisis leads to a significant change in research priorities in an innovation landscape with a strong global division of labour
- Despite a global free trade system, economic development in individual countries and georegions is very different
- New technologies are being developed in a globally open framework - but also involve significant global risks
- Companies have learned to make environmentally appropriate decisions even without massive environmental and climate crises or their consequences
- Globally oriented companies are gaining in importance compared to nation states and are shaping world politics to a large extent
- The German economy is changing rapidly and is building up (in new industries) strong world market leaders ("global champions")
- Germany is developing into a leading digital nation 'on par' with USA and China
- Professional success in a working world changed by the crisis creates a new world self-value system
- Large-scale stagnation of EU development with strong emphasis on individual interests
- Creeping systemic crisis: politics loses confidence and reforms fail to materialise
- Low importance of fact-based information in the media and the public
- Companies are increasingly taking a long-term, forward-looking approach, while politicians think in shorter cycles and act accordingly
- Companies undermine the role of the state and weaken its ability to act
- The power of the factual: Extensive surveillance despite fundamental skepticism in society
- Privatised education and/or social security systems increase disparities in society
- Security thinking is perceived by society as gagging
- Digitalization as a problem solver in everyday life - virtualization of everyday life in the case of loss of interpersonal closeness and interaction
- Urbanization trends with strong individualization and trend towards isolation
- Significant change in the labour market and employment relationships - but with largely constant remuneration systems
- Characteristic development (= only occurs in this scenario)
- Part characteristic value (= comes in this strength only in this scenario)
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.
Scenario 7: The ongoing crisis

COVID19 remains an exceptional crisis, but a variety of other global crises beyond pandemics remain unchanged. No essential “lessons learned” from COVID19 - handling of pandemics remains unchanged. Even massive environmental and climate impacts do not lead to a significant change in the priorities of P-U-K concentration on geo-regional and/or system blocks. Turning away from global world trade slows down global economic momentum.

Countries and georegions strive for greater self-sufficiency in their technology and innovation policies. New technologies are developed in a single georegion or system - but also involve significant risks. Independent science has little exposure in the media, which are not very fact-based, and in the public.

Even massive environmental and climate impacts do not lead to a significant change in the priorities of P-U-K. Foresight and resilience strategies do not play a major role either in politics or in companies. Strengthening authoritarian and nationalist forces leads to a “policy of the strong hand.”

The power of the factual: Extensive surveillance despite fundamental skepticism in society. Rigid educational and social systems cement social disparities in society. Urbanization trends with strong individualization and trend towards isolation. Large-scale stagnation of EU development with strong emphasis on individual interests. Mood democracy/emergence of semi-authoritarian structures and “prescribed trust.” Low sense of justice in society / Low subjective well-being. The (shrinking) German economy remains in traditional structures and is losing importance globally. Germany falls (far) behind in digital transformation. After the crisis is before the crisis: People define themselves through professional success within established roles and professional groups.

Traditional consumption: After the Corona crisis, people are following old patterns of consumption and making up for missed consumption opportunities. The (shrinking) German economy remains in traditional structures and is losing importance globally. Germany falls (far) behind in digital transformation. After the crisis is before the crisis: People define themselves through professional success within established roles and professional groups.

Muddling Through - no systemic changes in the health care system. Traditional consumption: After the Corona crisis, people are following old patterns of consumption and making up for missed consumption opportunities. The power of the factual: Extensive surveillance despite fundamental skepticism in society. Rigid educational and social systems cement social disparities in society. Urbanization trends with strong individualization and trend towards isolation. Large-scale stagnation of EU development with strong emphasis on individual interests. Mood democracy/emergence of semi-authoritarian structures and “prescribed trust.” Low sense of justice in society / Low subjective well-being. The (shrinking) German economy remains in traditional structures and is losing importance globally. Germany falls (far) behind in digital transformation. After the crisis is before the crisis: People define themselves through professional success within established roles and professional groups.
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.
Scenario 8: Break-up of order

- Diversity of global and regional crises including new and intensive pandemics
- Countries and georegions strive for greater self-sufficiency in their technology and innovation policies
- Turning away from global world trade slows down global economic momentum
- Significant risks lead to regulation and/or user reluctance and thus to a slowdown in technological development
- Significant decline in the quality of information due to little fact-based media and increasingly dependent sciences
- Disintegration and disintegration of the European Union (the Eurosystem)
- Emergence of semi-authoritarian structures and "prescribed trust"
- Strong authoritarian and nationalist structures characterize conflictual world political situation
- Foresight and resilience strategies do not play a major role either in politics or in companies
- No significant "lessons learned" from COVID19 handling of pandemics remains unchanged
- Even massive environmental and climate impacts do not lead to a significant change in the priorities of P-O-K
- Authoritarian forces undermine the role of the state and weaken its ability to act
- Rigid educational and social systems cement social disparities in society
- Foresight and resilience strategies do not play a major role either in politics or in companies
- International companies take over large parts of the weakened German economy
- Significant decline in the quality of information due to little fact-based media and increasingly dependent sciences
- Rigid educational and social systems cement social disparities in society
- Society does not feel up to increasing risks
- Restricted consumption: Traditional consumers must restrict their consumption - existential needs dominate
- Even massive environmental and climate impacts do not lead to a significant change in the priorities of P-O-K
- Strong authoritarian and nationalist structures characterize conflictual world political situation
- Significant risks lead to regulation and/or user reluctance and thus to a slowdown in technological development
- Significant decline in the quality of information due to little fact-based media and increasingly dependent sciences
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Break-up of order
The ongoing crisis
Massive virtualization
In Corporate Hands
New global dynamics
Farewell to the familiar
The pandemic decade
The Golden Twenties

Scenario assessment: Total
Scenario assessment: proximity to the present

The ongoing crisis
The Golden Twenties
In Corporate Hands
Massive virtualization
New global dynamics
Farewell to the familiar
The pandemic decade
The Break-up of order

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Scenario icons: Target creator
Scenario assessment: Where we stand today ...

Broad innovation, structural change and virtualisation of everyday life

In corporate hands: Progress at the expense of participation

Massive virtualization: Safety and new proximity in connected world

Dealing effectively with pandemics

NORMALITY & GLOBAL DYNAMICS

New global dynamics: Fair growth in cooperative structures

Farewell to the familiar: De-globalization and cutting consumption

Danger of a pandemic is suppressed

The ongoing crisis: A fertile ground for authoritarian ideas

The Golden Twenties: The old normality is back

Economic crisis

Break-up of order: Loss of control and Desolidarisation

The pandemic decade: Resilience as the dominant guiding principle

Little innovation, traditional structures and digital standstill

Pandemic mix

Traditional economy

Transformed economy

6

5

4

3

2

1

7

8

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Scenario assessment: Where we stand today ...

**NORMALITY & GLOBAL DYNAMICS**

- **The Golden Twenties:** The old normality is back (31%)
- **The ongoing crisis:** A fertile ground for authoritarian ideas (37%)
- **Break-up of order:** Loss of control and desolidarisation (19%)
- **The pandemic decade:** Resilience as the dominant guiding principle (4%)
- **New global dynamics:** Fair growth in cooperative structures (2%)
- **In corporate hands:** Progress at the expense of participation (2%)
- **Dealing effectively with pandemics:**
  - Economic crisis
  - Traditional economy
  - Transformed economy

**Broad innovation, structural change and virtualisation of everyday life**

**Massive virtualization:** Safety and new proximity in connected world (4%)

**Farewell to the familiar:** De-globalization and cutting consumption (4%)

**Little innovation, traditional structures and digital standstill**

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**Scenario assessment: Expected future**

- The Golden Twenties: 71
- The pandemic decade: 46
- Farewell to the familiar: 51
- New global dynamics: 59
- Massive virtualization: 74
- In Corporate Hands: 24
- The ongoing crisis: 34
- Break-up of order: 49

Legend:
- Target creator

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Scenario assessment: Expected future

Broad innovation, structural change and virtualisation of everyday life

In corporate hands: Progress at the expense of participation

Massive virtualization: Safety and new proximity in connected world

NORMALITY & GLOBAL DYNAMICS

New global dynamics: Fair growth in cooperative structures

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The ongoing crisis: A fertile ground for authoritarian ideas

Pandemic decade: The old normality is back

In economic crisis

In traditional economy

In transformed economy

The pandemic decade: Resilience as the dominant guiding principle

Conditions

Future scenarios
**Scenario assessment: Expected future**

- **Broad innovation, structural change and virtualisation of everyday life**
  - In corporate hands: Progress at the expense of participation (11%)
  - Massive virtualization: Safety and new proximity in connected world (11%)
  - Farewell to the familiar: De-globalization and cutting consumption (20%)

- **Normality & Global Dynamics**
  - New global dynamics: Fair growth in cooperative structures (9%)
  - The Golden Twenties: The old normality is back (8%)

- **Danger of a pandemic is suppressed**
  - The ongoing crisis: A fertile ground for authoritarian ideas (15%)

- **Pandemic mix Crisis**
  - Break-up of order: Loss of control and desolidarisation (12%)
  - The pandemic decade: Resilience as the dominant guiding principle (14%)

- Economic crisis
- Traditional economy
- Transformed economy
Scenario assessment: Expected future

Scenarios 3 ("Saying Goodbye to the Ordinary") and 4 ("New Global Dynamics") are expected above all by the evaluators, who are also optimistic about the current pandemic development.

Scenarios 7 ("The continuous crisis") and 8 ("Disintegration of order") are expected above all by the evaluators, who are also pessimistic about the current pandemic development.
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).
In terms of expectations, scenarios 3, 4 and 5 on the one hand and scenarios 6 and 7 on the other show similar patterns.

The colours indicate that the evaluators have indicated the relevant scenario as an expected scenario.
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.
100

75

50

25

Break-up of order
The ongoing crisis
Massive virtualization
In Corporate Hands
New global dynamics
Farewell to the familiar
The pandemic decade
The Golden Twenties

Scenario assessment: Desired future
**Scenario assessment: Desired future**

**Broad innovation, structural change and virtualisation of everyday life**

**In corporate hands: Progress at the expense of participation**

**Massive virtualization: Safety and new proximity in connected world**

**New global dynamics: Fair growth in cooperative structures**

**Farewell to the familiar: De-globalization and cutting consumption**

**The ongoing crisis: A fertile ground for authoritarian ideas**

**The Golden Twenties: The old normality is back**

**The pandemic decade: Resilience as the dominant guiding principle**

**Break-up of order: Loss of control and Desolidarisation**

**Little innovation, traditional structures and digital standstill**

- **Economic crisis**
- **Traditional economy**
- **Transformed economy**
Scenario assessment: Desired future

- **Economic crisis**
  - Danger of a pandemic is suppressed: 0%
  - Pandemic mix crisis: 0%
  - Break-up of order: Loss of control and desolidarisation: 0%
- **Traditional economy**
  - In corporate hands: Progress at the expense of participation: 0%
  - Pandemic decade: Resilience as the dominant guiding principle: 2%
- **Transformed economy**
  - Normality & Global dynamics: 60%
  - New global dynamics: Fair growth in cooperative structures: 18%
  - Massive virtualization: Safety and new proximity in connected world: 20%
  - Farewell to the familiar: De-globalization and cutting consumption: 18%
  - The ongoing crisis: A fertile ground for authoritarian ideas: 0%
  - The Golden Twenties: The old normality is back: 0%

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**Scenario assessment:** Desired transformation

- **Broad innovation, structural change and virtualisation of everyday life**
- **In corporate hands:** Progress at the expense of participation
- **Massive virtualization:** Safety and new proximity in connected world
- **The ongoing crisis:** A fertile ground for authoritarian ideas
- **New global dynamics:** Fair growth in cooperative structures
- **Dealing effectively with pandemics**
- **Farewell to the familiar:** De-globalization and cutting consumption
- **Economic crisis**
- **Traditional economy**
- **Transformed economy**

**NORMALITY & GLOBAL DYNAMICS**

- **The Golden Twenties:** The old normality is back
- **The pandemic decade:** Resilience as the dominant guiding principle

**Scenario icons:** Target creator

- **NORMALITY: & GLOBAL DYNAMICS**
  - Economic crisis
  - Traditional economy
  - Transformed economy
Scenario assessment: Desired transformation

Three central questions:
1) How do we achieve broad-based innovation and structural change?
2) How much (global) dynamics or (regional) deceleration do we need?
3) How much do we want to virtualize work and life - and at what price?
### Post-corona scenarios: Possible uses

<table>
<thead>
<tr>
<th>Scenarios Derive</th>
<th>Develop own specific environment scenarios based on the post-corona scenarios.</th>
<th>Review existing strategies against specific environmental scenarios</th>
<th>Use post-corona scenarios as a basis for own environment and strategy scenarios.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Rate</td>
<td>Individually evaluate post-corona scenarios and derive consequences for your own actions.</td>
<td>Use individually evaluated post-corona scenarios to test the robustness of your own strategies.</td>
<td>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.</td>
</tr>
<tr>
<td>Use</td>
<td>Derive consequences for their own actions from the post-corona scenarios.</td>
<td>Use the post-corona scenarios to test the robustness of your own strategies.</td>
<td>Conceivable reaction to identify corona in the form of own strategy scenarios and prioritize them with the help of post-corona scenarios.</td>
</tr>
</tbody>
</table>

**Making your own decisions robust and resilient**

- **Consequence analysis**
- **Stress test**
- **Strategy Scenarios**
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.

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