Post-Covid Scenario Process

The New Global
World Economy, Power Shift and Global Architectures

Projection Catalogue
16 August 2021
#1 Geo-strategic rivalry and alliances

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):
- Unipolar world system (still US- or China-driven)
  - Do we see one leading nation?
- Uni-, Duo-, Multipolar
- Group of nations as leading power
- No-state-actors
- Europa as a third pillar (1A)
- Conflict AND Cooperation
- Rivalry on topics or ideology
- Solutions for GLOBAL problems?

- Single key factor for political system
- Democratic vs. authoritarian system
- Leadership style and consensus culture
- Democracy index
- Efficiency of the different models

Independent position of the middle powers (e.g. Europe, Russia, India):

<table>
<thead>
<tr>
<th>Projection 1A</th>
<th>Multipolar geo-architecture based on cooperation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projection 1B</td>
<td>Multipolar geo-architecture with numerous conflict lines</td>
</tr>
<tr>
<td>Projection 1C</td>
<td>USA and China cooperate as superpowers - other states fade into the background</td>
</tr>
<tr>
<td>Projection 1D</td>
<td>New division - USA and China as superpowers with corresponding spheres of influence</td>
</tr>
</tbody>
</table>

Degree/intensity of geo-strategic rivalry between the U.S. and China:

Projection 1E Unipolar world with dominance of one super power
#2 Competition of political systems

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):

- What is the West? US/EU or also Australia, Japan/Korea ...
- Role of Europe: Third pillar or mainly ally of US
- How does the EU develop?
- More neutral description: traditionalist, ...
- USA-China-Strategy: partners, opponents, enemies
- European China-strategy? → FAZ-article

![Diagram showing projections]

Projection 2A: Western Values on the Retreat - Dwindling Attractiveness at Home and Abroad

Projection 2B: Value competition everywhere - authoritarian ideas gain a foothold in the West AND Western ideas are globally attractive

Projection 2C: Emergence of value blocs - Western democracies versus autocracies

Projection 2D: High attractiveness of Western values around the world

Attractiveness and power of Western values in countries outside of the "Western world"
#3 World order

Degree of multilateral co-operation / decision-making

- **Projection 3A**: Clearly multilateral world order with powerful global institutions
- **Projection 3B**: Global companies have strong influence on world order
- **Projection 3C**: World order is driven by Nation states
- **Projection 3D**: World order is characterized by competitions between several interest-driven non-state actors

Substitution of public power by non-state institutions
#4 Global awareness / Identities

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**
- Non-political effects
- 5D split: Identities beyond state-level dominate
- X-Axis: State- vs. non-state-driven (market states)
- Strength of diplomacy ; Willingness to understand the other side
- Sharp, soft and hard power / balance
- Military conflicts

![Diagram showing projections 4A, 4B, 4C, 4D]

**Projection 4A**
Significant increase in global awareness and multilateral cooperation

**Projection 4B**
Glocalism - replacement of national-state ideas by global AND regional identities

**Projection 4C**
Dominance of national interests and identities

**Projection 4D**
Neo-fragmentation - nation-states are increasingly fragmented without global concepts taking hold in parallel

**Strength of regional / sub-national identities (relative to national identities)**
#5 China / Power Shift

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):
- Role of the human in Europe and Asia
- Tipping point for not being democratic anymore
- Aggressiveness is not a good axis → Independent and self-reliance regarding technology?
- Openness vs. closed
- Role / speed of technology (AI)
- X-Axis: Lagging behind vs. leading role

<table>
<thead>
<tr>
<th>High</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Projection 5A</strong></td>
<td><strong>Projection 5B</strong></td>
</tr>
<tr>
<td>China opens up, but lags behind in economic and technological competition</td>
<td>China opens up and becomes an economically and technologically leading nation</td>
</tr>
<tr>
<td><strong>Projection 5C</strong></td>
<td><strong>Projection 5D</strong></td>
</tr>
<tr>
<td>China is sheltering and thus jeopardizing its economic success</td>
<td>China has an economically and technologically leading position despite strong domestic orientation</td>
</tr>
</tbody>
</table>

Openness of China (External and internal focus)

Economic and technological position of China in global competition
#6 Asianization / Role and structure of Asia

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):

- China as a hegemon for Asia?
- Economical and/or cultural asianization
- Eurasia / Role of Russia
- Role of the Arctic
- Acceptance of China within Asia
- Balance of power between India and China
- Additional factor for most important single players
- Predictability / stability / volatility of alliances

![Diagram showing four projections regarding China's role in Asia:](chart)

- **Projection 6A**: Strong Asian nations and alliances in conflict with China
- **Projection 6B**: China as an accepted partner in Asia
- **Projection 6C**: China's hegemonic policy increasingly meets with resistance in Asia
- **Projection 6D**: China as an accepted hegemon in Asia

Acceptance of China within Asia
Discuss aspects (Dimensions/uncertainties, projections, trends, sources):

- What is the West? US/EU or also Australia, Japan/Korea ...
- Role of Europe: Third pillar or mainly ally of US
- How does the EU develop?
- More neutral description: traditionalist, ...
- USA-China-Strategy: partners, opponents, enemies
- European China-strategy? → FAZ-article
#8 Global South / Emerging and developing countries

<table>
<thead>
<tr>
<th>Degrees of political freedom</th>
<th>Economic development</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Projection 8A</td>
</tr>
<tr>
<td></td>
<td>Politically more</td>
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<td></td>
<td>independent</td>
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<td>development of the</td>
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<td>global South - but no</td>
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<td>economic catching up</td>
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<tr>
<td>Low</td>
<td>Projection 8B</td>
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<td>Economic and</td>
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<td>Political</td>
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<td>Strengthening of the</td>
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<td>Global South</td>
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<tr>
<td>Moderate (Lagging behind)</td>
<td>Projection 8C</td>
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<tr>
<td></td>
<td>Self-centered major</td>
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<td>powers dominate</td>
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<td>development in the</td>
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<td>global South -</td>
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<td>Economic</td>
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<td></td>
<td>development remains</td>
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<td>stalled</td>
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<tr>
<td>Strong (Closing the gap)</td>
<td>Projection 8D</td>
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<td>Major powers vie for</td>
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<td>countries of the</td>
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<td>global South and</td>
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<td>promote their</td>
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<td></td>
<td>economic</td>
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<td>development in the</td>
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<td></td>
<td>process</td>
</tr>
</tbody>
</table>
#9 Global inequality

Inequality between Western industry states and emerging countries

**Projection 9A**
The World is Moving Closer Together - Overall Decline in Global Inequality

**Projection 9B**
Emerging countries catch up with the West - but the Global South is left behind

Inequality between emerging countries and Global South

**Projection 9C**
The global South becomes a growth hotspot - but the West continues to stand out

**Projection 9D**
The world is drifting (further) apart - Wide spread between the West, the emerging countries and the global South

Significantly lowered

lower

higher
#10 Global conflicts and migration

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Increasing inequality WITHIN countries
- Levers for migration: climate change, freedom/human rights, fight for resources → political dimension
- Economic side of climate change: leads to inequality via decreased economic power → fight for resources
- Inequality reflects opportunity; this can create tension
- Global level of polarization “rich vs. poor” / Development of the prosperity gap
- Development of migration / number of migrants and refugees
- Different reasons for migration
  - Economical development / Poverty
  - Lack of freedom and human rights
  - Armed conflicts
- Countries / conflicts of origin
- Destinations / Role of regional pull factors
- Internally displaced persons
- Role of facilitators for illegal migration

**Intensity of global migration / refugees**

**Projection 10A**
Strong (economically, ecologically or value-based) migration movements with overall moderate conflicts

**Projection 10B**
Multiple global conflicts lead to strong global migration movements

**Projection 10C**
Overall peaceful development with few conflicts and moderate migration movements

**Projection 10D**
Intense global conflicts, but not leading to strong migration movements

**Projection 10E**
Within-country and -georegion gaps lead to internal migration

**Degree and intensity of global conflicts**
#11 Social balance / Well-being and Global middle class

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):
- Degree of servitization (Will the loss of industrialized jobs be compensated?)
- Industry vs. post-industry era
- Wealth gap

Projection 11A
Global Balance Leads to Conflicts within the Western Industrialized Countries

Projection 11B
Overall high subjective well-being and social balance

Projection 11C
Overall low subjective well-being and social balance

Projection 11D
Social equalization in Western countries - but fewer opportunities for advancement in emerging countries

Strong = Closing of global wealth gap
Moderate = Remaining global wealth gap

Satisfaction of the Old Middle Class in the Western Industrialized Countries
#12 Global environmental situation and Climate change

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Green technologies → KF 7
- Is climate change in northern regions irreversible? (as prejudiced in southern regions)
- Who are winners/losers of climate change? (e.g. wineyards in Greenland)
- Will climate change stimulate national / local regulation?
- Closer look on length of coastal areas per region / nation → how vulnerable are specific regions?
- Closer look on tipping points and other environmental issues
- Include ecosystem services
- Loss of biodiversity
- Effects on infrastructure? (costs for adaption)
- X: Degree of destruction of political, social & infrastructures due to climate impacts in southern countries
- Y: Degree of destruction of political, social & infrastructures due to climate impacts in northern/industrialized countries

![Diagram showing impacts of climate change in different regions and projections](image)

- **Projection 12A**
  - Consequences of climate change in all geographical regions - but less destruction of structures
- **Projection 12B**
  - Massive consequences of climate change
- **Projection 12C**
  - Moderate consequences of climate change
- **Projection 12D**
  - Consequence gap - Destruction of structures in the South vs. low pressure to act in the North

**Direct pressure to act in (Northern) industrialized countries due to environmental and climate impacts**

- Degree of destruction of political and social structures due to climate impacts in southern countries
#13 Green / Climate protection technologies

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**
- Greenhouse gases instead of CO2
- Speed of technology innovation
- Time!
- Technology acceptance
- CO2 capture
- Lead new technologies to a change in consumer behaviour? \( \rightarrow \) #15
- Lead new technologies to a change in education/skills?
- Grade of substitution of traditional technologies
- Costs of green technologies
- Who pays for green technologies?
- Available money for adaption to climate change
- Development / coordination of green technology ecosystem
- First mover?
- Well-to-wake
- Carbon neutral is not automatically carbon neutral! E.g. oxyd fuel cells/hydrogen
- Source: Agora Energiewende
  
  https://www.agora-energiewende.de/veroeffentlichungen/

**Development of technologies to manage the consequences of climate change**

**Projection 13A**
- Green technologies focus on managing the consequences of climate change

**Projection 13B**
- Dominant role of green technologies - for reducing GHG-pollution AND for managing the consequences of climate change

**Projection 13C**
- Moderate development of green technologies

**Projection 13D**
- Green technologies focus on reducing the GHG-pollution

**Contribution of new technologies to the reduction of GHG-pollution**

**Strong**
#14 Climate policies

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Homogeneity of global political activities?
- Which technologies are supported?
- Investions in technologies vs. regulation
- Degree of solidarity between nations, regions, industries, ...
- Not only CO2, but complete set of greenhouse gases (GHG)
- Time / speed of effects of climate policies
- Degree of acceptance (globally / locally)
- Influence on world economy
- Resistance and even violence against climate policies
- Intensity of regulation / personal rights (mobility etc.)
- Political force to act
- Demographic effect on political activities
- Regional / local effects
- Individual circumstances and needs
- Allocation of costs for environmental / climate policies
- "Verursacher-Prinzip" muss differenziert betrachtet werden
- Mix of political tools

#### Intensity of political action to manage the consequences of climate change

<table>
<thead>
<tr>
<th>Strong</th>
<th>Moderate</th>
<th>Weak</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projection 14A</td>
<td>Climate policies are focusing of management of consequences - Only moderate GHG-reduction</td>
<td></td>
</tr>
<tr>
<td>Projection 14B</td>
<td>Consequent climate policies on both levels - reduction of GHG-pollution AND management of consequences</td>
<td></td>
</tr>
<tr>
<td>Projection 14C</td>
<td>Climate policies are not consequent - short-term political and economical interest still dominate</td>
<td></td>
</tr>
<tr>
<td>Projection 14D</td>
<td>Political focus on reduction of GHG-pollution - management of consequences only two-tier</td>
<td></td>
</tr>
</tbody>
</table>

#### Degree of political action to reduce GHG-reduction
#15 Value systems / Trust in public authorities

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- ###

<table>
<thead>
<tr>
<th>Value orientation</th>
<th>Trust in state, government and public authorities</th>
</tr>
</thead>
</table>
| strong collectivism | Projection 15A  
Strong community orientation beyond official, public, political structures |
| strong individualism | Projection 15B  
Trust in states and public institutions and their community-oriented policies |
| low | Projection 15C  
Dominance of the individual - Low trust in communities and public institutions |
| high | Projection 15D  
High trust in states and public institutions - with strong individualism |
#16 Economic development / Globalization and world trade

**Discussed aspects**
(Dimensions/uncertainties, projections, trends, sources):
- Globalization might differ between industries, given e.g. investment structures and business models
- Right now, global trades inhibits some difficulties, leading to a wish for regional production
- Consumption patterns, regarding climate change → link to global trade
- Trade of content / knowledge VS. Trade of physical goods

<table>
<thead>
<tr>
<th>Strong (free trade)</th>
<th>Reduced (e.g. Protectionism)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projections</td>
<td>Level of globalization</td>
</tr>
<tr>
<td>Projection 16A</td>
<td>Sustained slumps and low global economic momentum despite largely free trade system</td>
</tr>
<tr>
<td>Projection 16B</td>
<td>Return to economic dynamism in a global free trade system</td>
</tr>
<tr>
<td>Projection 16C</td>
<td>Turning away from global world trade slows down world economic momentum</td>
</tr>
<tr>
<td>Projection 16D</td>
<td>High economic dynamism despite significant restrictions on free world trade</td>
</tr>
<tr>
<td>Projection 16E</td>
<td>Significant restructuring of the global economy towards greater sustainability</td>
</tr>
</tbody>
</table>

Dynamic of world trade

- Limited
- Traditionally high
- Restructured

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#17 Global financial system / markets

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Link between regulation and taxation → do they go hand in hand / linear relationship
- Regulation can go in different direction, but generally enlarges the cost level
- Can interest level be high? → given levels of inflation; linkage of interest rates and regulation is weakened
- Asset inflation increases, but inflation calculated in traditional way is not impacted

**Existence of global financial system**

<table>
<thead>
<tr>
<th>Given</th>
<th>Not given</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projection 17A</td>
<td>Projection 17B</td>
</tr>
<tr>
<td>Alternative and multilateral global monetary system organized by G20</td>
<td>Global financial markets following western standards – USA maintaining its role as the central stabilizing factor in the financial system</td>
</tr>
<tr>
<td>Projection 17C</td>
<td>Projection 17D</td>
</tr>
<tr>
<td>Financial uncertainty: Blocs and nations operate without subordinate structures</td>
<td>Competing monetary blocs operate within the given structures</td>
</tr>
<tr>
<td>Projection 17E</td>
<td></td>
</tr>
<tr>
<td>Financial anarchy: Loss of control over monetary system boosts alternative private payment devices</td>
<td></td>
</tr>
</tbody>
</table>

**Resolving of financial challenges in current system**

**Given**

- High

**Not given**

- Low

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Link between regulation and taxation → do they go hand in hand / linear relationship
- Regulation can go in different direction, but generally enlarges the cost level
- Can interest level be high? → given levels of inflation; linkage of interest rates and regulation is weakened
- Asset inflation increases, but inflation calculated in traditional way is not impacted
#18 Company structures / Global digital platforms

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):
- Defining what ethical responsibility means
- Legislation might be the actual driver between ecosystem structures → return to structures as in beginning of 20th century?
- Pressure to change for companies: does it stem from customers, investors, politics or from intrinsic motivation
- Why should a monopolist reconsider ethical terms? (Google: “Don’t be evil.”)
- State-driven funds/pension funds also have some impact on companies / certain dependency

<table>
<thead>
<tr>
<th>Strong</th>
<th>Moderate</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projection 18A</td>
<td>Digital network monopolies operate purely on the basis of power and profit - ethical requirements on paper at best</td>
<td></td>
</tr>
<tr>
<td>Projection 18B</td>
<td>Digital network monopolies with high ethical standards</td>
<td></td>
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<tr>
<td>Projection 18C</td>
<td>Traditional competitor focuses on short-term profit targets - ethical behavior plays only a subordinate role</td>
<td></td>
</tr>
<tr>
<td>Projection 18D</td>
<td>Traditional competitive structures - often with advantages for ethically responsible companies</td>
<td></td>
</tr>
</tbody>
</table>

Adherence to ethical standards (intrinsic / legal)
#19 Consumption patterns / Resource efficiency

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):

- Efficiency of circular economy
- Degree of implementation of circular economy
- Circular economy can support growth
- Other / different approaches to innovative economical systems (post growth)
- Economic/ Policy-Making Beyond GDP: An Introduction Alessio Terzi DISCUSSION PAPER 142 / JUNE 2021
- Taxation (national / globally)
- Ecological tax reform
- Impact on global trade
- New political guidelines (economical + ecological + social aspects in ONE target system)
- Pricing (CO2 and other)
- How can we influence direction / intensity of change in consumption patterns?
- Social & climate question needs to be discussed commonly
- Individual GHG account
  https://www.openpetition.de/petition/online/individuelles-co2-konto-fuer-jeden-menschen
- Influence on economic competition
- Individual motivation (Greta Thunberg)
  Climate responsible lifestyles
- Natalität – Geburt neuer Personen, Ideen, Technologien = Gamechanger

Change in consumption patterns (in industrial and emerging countries)

- **Projection 19A**
  Change in consumption patterns puts a sustained brake on consumption growth

- **Projection 19B**
  Significant slowdown in consumption growth through changes in consumption patterns AND Circular Economy approaches

- **Projection 19C**
  Largely unchanged consumption patterns

- **Projection 19D**
  Circular economy approaches enable continuation of the (modified) consumption path

Relevance of circular economy (and similar sustainability approaches)
#20 Digital technologies (AI, XR, QC) and digitization

## Discuss aspects
(Dimensions/uncertainties, projections, trends, sources):
- Aspects of regulation
- People vs. Company part in the usage / targets of technology
- One aspect: the more data, the better; but still, ethics influence the usage and implementation of data and technology
- Digital penetration creates opportunities for policy makers → usage for further activities

### Degree of digital transformation / Digital penetration

- **Projection 20A**
  - Digital division of the world - Few digital superpowers set themselves apart

- **Projection 20B**
  - Digital development permeates all countries and strata

- **Projection 20C**
  - Digital Plutocracy - Small digital elite drives development

- **Projection 20D**
  - Digital divide in all countries and societies - Digital elite sets itself apart

- **Projection 20E**
  - Digital transformation slows down

**Discussed aspects**
- Aspects of regulation
- People vs. Company part in the usage / targets of technology
- One aspect: the more data, the better; but still, ethics influence the usage and implementation of data and technology
- Digital penetration creates opportunities for policy makers → usage for further activities
#21 Tech policies of nations / Digital policies

**Discussed aspects (Dimensions/uncertainties, projections, trends, sources):**

- Companies/governments vs. Offenders: who is faster in technological adaption? (offenders can also be governments and companies)
- Impact of block-building → standardization of IT-side or law side (e.g. protection of European data on clouds) Defense-driven view is not depicted yet

### Standardization of technology concepts

<table>
<thead>
<tr>
<th>Low (= high diversity)</th>
<th>High (= global concepts)</th>
</tr>
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<tbody>
<tr>
<td>Projection 21A</td>
<td></td>
</tr>
<tr>
<td>Competition or co-</td>
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<tr>
<td>existence between</td>
<td></td>
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<tr>
<td>different technology</td>
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<tr>
<td>worlds</td>
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<td>Projection 21B</td>
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<tr>
<td>Cold (or heat)</td>
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<td>technology wars</td>
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<td>Projection 21C</td>
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<td>Globally standardized</td>
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<td>technology landscape</td>
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<td>with ways to</td>
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<td>effectively secure the</td>
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<td>systems</td>
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<td>Projection 21D</td>
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<td>Globally standardized</td>
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<td>technology landscape</td>
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<td>is repeatedly</td>
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<td>attacked by external</td>
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<td>forces</td>
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</table>

**Degree of technology-based conflicts**
#22 Energy resources and systems NEW

**Discussed aspects**

(Dimensions/uncertainties, projections, trends, sources):

- Allocation of energy production vs. energy consumption
- Constant or rising energy needs make local / sustainable energy consumption impossible – sufficiency is needed
- Too many aspects within one dimension
- Energy mix
- Differentiation between liquid fuels (bio fuels, non-carbon fuels)
- Degree of carbonization
- Carbon neutral not automatically GHG neutral

Projection 22A
The rise of renewable energy sources is still location-based and leads to global inequalities in power security

Projection 22B
Green production as well as innovations in energy transportation and storage lead to more resilient energy system

Projection 22C
Fossil fuels are only being replaced very slowly – many conflicts due to unsecure energy transport

Projection 22D
Fossil fuels are only being replaced very slowly – low pressure on concentrated production system due to efficient and secure energy transport

Projection 22E
Smaller, decentralized units of energy production in traditional energy mix are spread around the georegions and nations – resources stay important for global power position

**Level of decarbonization in energy production**

- High
- Low

**Structure of the energy system**

- Centralized, critical energy transport
- Centralized, efficient and secure transport
- Strongly decentralized
#23 Land, agriculture and food

Discussed aspects (Dimensions/uncertainties, projections, trends, sources):

- Competition between bio fuels & food requirements
- Consumption patterns (regarding food / availability of fruits & vegetables)
- “Think global – act local”
- National / economic interests vs. ecological effects
- New protein sources (insects, artificial, ...)
- Aqua cultures beyond maritime areas
- Availability of agricultural areas / land
- Effects of urbanization → development of urban farming, gardening, mining ...
- “War for food”
- “War for water”
- “War for biodiversity”
- Ecosystem services
- SDG 17 (UN)

<table>
<thead>
<tr>
<th>Projection 23A</th>
<th>Projection 23B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable agriculture and food management leads to global supply shortages</td>
<td>Overall critical development of the agriculture and food sector - low sustainability and global supply shortages</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Projection 23C</th>
<th>Projection 23D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable agriculture and food management enables global supply</td>
<td>Highly efficient supply system - but with significant negative consequences for the environment and sustainable development</td>
</tr>
</tbody>
</table>

Sustainability and environmental compatibility of the global agriculture and food industry