

## **Will Coronavirus unite or divide our society?**

Stress testing of D2030 scenarios reveals coming cleavages in our society.

We are at a bifurcation with reasons for optimism but no certainty. A reassessment of pre-crisis scenarios exposes a shift in our perceptions of the future due to the pandemic – to the better and to the more extreme options.

The Corona crisis, as any crisis, inspires forward thinking. Since the outbreak of Covid-19, lots of visions and scenarios for the post-pandemic period have been proposed. At a closer look, all of them reveal the mind-sets of their creators. Economists think in terms of best case, worst case, and middle case, financial analysts in terms of a short recession with quick recovery versus a long and deep depression. Environmental activists hope for a quick transition to sustainability. However, to me, they all follow rather one-dimensional thinking. Futurists however generate scenario sets. Most of them take refuge with the scenario cross method, they employ two dimensions with two extremes and combine these extremes to four scenarios. Again, the selection of the two axes heavily depends on the worldview of the scenario writers. And quite naturally, each set includes as well a kind of business as usual scenario, as a crash scenario and a transformative or wishful scenario. One easily identifies them as Jim Dator's scenario archetypes.

We – the team of D2030 – took another more complex approach: We put existing scenarios to a "corona stress test", using the pandemic as a wild card – an event that happens out of the blue and that disturbs our future expectations. If the world is deeply changed by the pandemic, this should be seen in the scenario landscape. And it is.

Three years ago, we constructed scenarios for the future of Germany with a time horizon of 2030. We generated them in an extensive participatory process with hundreds of participants, several workshops, and a final conference. A consistency analysis of 33 key factors with 149 future projections resulted in a set of eight scenarios. In the end, we combined them into four higher-level scenarios:

1. Acceleration on the existing track – close to a business as usual scenario
2. New horizons – with more cooperation, a stronger civil society, flourishing high-tech start-ups, and smart regulation
3. Refocusing on the region – deliberate roll-back of globalization for the sake of sustainability and more measured lifestyles
4. Back to old borders – populists and nationalists are in control.

These scenarios have a distinctive German touch, but one can easily apply them to other European countries.

What would the corona crisis do to our four scenarios? Back in 2017, most of our survey participants expected either a prolongation of the existing socioeconomic track or hopefully, some small steps in the direction of new horizons. Would the pandemic alter expectations and perhaps lead to a completely new interpretation of the scenarios? Which of our scenarios would survive that sort of a stress test? And what would this imply for the future of our society for aftershock developments and emerging opportunities?

Of course, nobody knows the outcome of the corona crisis. The pandemic could cause a short period of rapid change and then a return to normal or it could prove to be a tipping point for greater change. The crisis could result in a kind of new normality, bring deep structural change, or cause a long and horrific aftermath. Therefore, another set of scenarios came into play: six wood-cut scenarios for the immediate impact of the corona crisis.

Between March 31st and April 8th 2020 we ran a survey. We invited experts for two tasks: First, to give their opinion about the immediate impact scenarios as sketched above; and second to assess the 149 future projections that lead to the 2017 scenarios.

We asked them: What is your estimate of the likelihood of projection X on a scale from 1 (almost impossible) to 5 (the future I expect)? We received 117 returns from experts working in different fields, from consulting and business to civil society and research.

The results are encouraging. First of all, most of the experts believe that we will no longer carry on as before the crisis. 61% of the experts expect significant structural change in the economy and society. However, another 7% of the experts fear that the pandemic will produce a long and disastrous crisis. Only a small minority thinks that the pandemic will not have significant impact.

A closer look at the assessments of individual future projections reveals that structural change is interpreted by the experts in two different ways. Taken all together three out of four experts are rather optimistic. In their view, the likelihood has shifted from the scenario "Acceleration in the existing track" to the "New horizon" scenario: more focus on community and cooperation, on public welfare, and sustainability combined with a partially increasing role of the state and support for the EU. The remaining quarter of the experts expect in the medium to long term a development in direction of the "Back to old borders" scenario: preservation by separation, back to traditional values in the safe limits of the nation state. – Two quite different images of the future and both backed by strong societal forces!

According to the survey, the main impact of the corona crisis is a clear-cut conflict line in our society. We expect an increasing antagonism between the forces promoting change

and the forces of preservation. Of course, this antagonism has its roots in pre-pandemic times but the crisis gives much more punch to the confrontation. Coronavirus is not, as some hope, a force uniting the society, on the contrary it divides.

An analysis of survey returns also indicates what could be done:

- Actors in politics and civil society should embrace the changes and developments initiated during the crisis.
- Digitalization poses opportunities in many fields from schools to health sector and administration, in rural regions.
- More opportunities arise from a stronger orientation to public welfare with more administrative flexibility and, last but not least, a more active role of Germany in Europe.

The survey also indicates that old certainties are challenged: Some future projections that were assessed by the participants of the 2017 survey as very likely received much lower levels of likelihood in this exercise. Among them were many traditional values or former political mainstream ideas: status thinking, liberalization and privatization, the cult of efficiency, and reluctant attitudes towards digitalization.

Of course, not every change is due to the corona crisis. But the pandemic seems to foster processes of reorientation. Corona has opened the vista of new horizons – in the world of scenarios and in society.

- How can we take advantage of the opportunities produced by the crisis?
- What could be done to minimize political conflicts in the aftermath of the crisis?
- How can we prepare for the next wild card events?