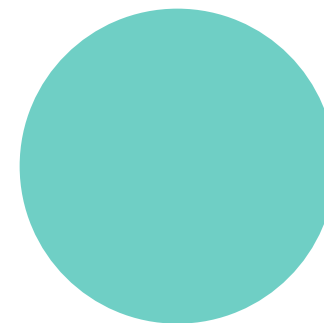
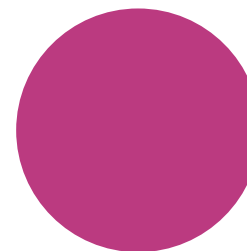




9+ billion people, living well, within planetary boundaries

Vision 2050 Issue Brief

Macrotrends & Disruptions shaping 2020-2030





Business leadership for a sustainable future .

World Business Council for Sustainable Development (WBCSD)

200 global companies united around a common vision
creating a world in which over 9 billion people are all living well
and within planetary boundaries by 2050





Vision 2050 Refresh.

WBCSD is working together with 40 member companies to update its Vision 2050. Together, we are

- reflecting some of the great changes that have taken place over the last decade.
- making the SDGs directly actionable with a systems transformation approach
- exploring the enablers that business can leverage to unlock transformation at scale.
- Outlining the pathways and key actions to an achievable, sustainable, future that business is excited & energized to work towards.

Doing business *and* advancing sustainable development

All signs point towards continued volatility over the next 10 years



Harry Brekelmans

**Projects & Technology
Director, Royal Dutch Shell**

**Member of the WBCSD
Executive Committee**

I know you often refer to the predictive qualities of the previous Vision 2050 effort in the context of the ‘turbulent teens’, and would also say that I expect fully to see ‘turbulent twenties’ and likely ‘turbulent thirties’ too – so let’s start visioning these in more detail.

How best to “vision” the future that could unfold?

Highly likely
macrotrends

How will demographics, the environment, economics, technology, politics and affect business’ ability to operate – what trends can we see in these landscapes today, that are so well established that they will highly likely continue or deepen over the next 10 years?

Less likely,
but high
impact
disruptions

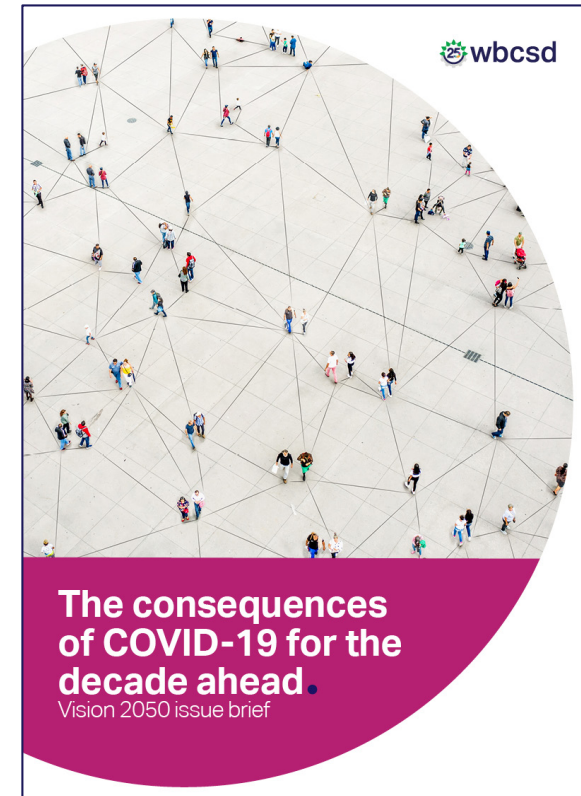
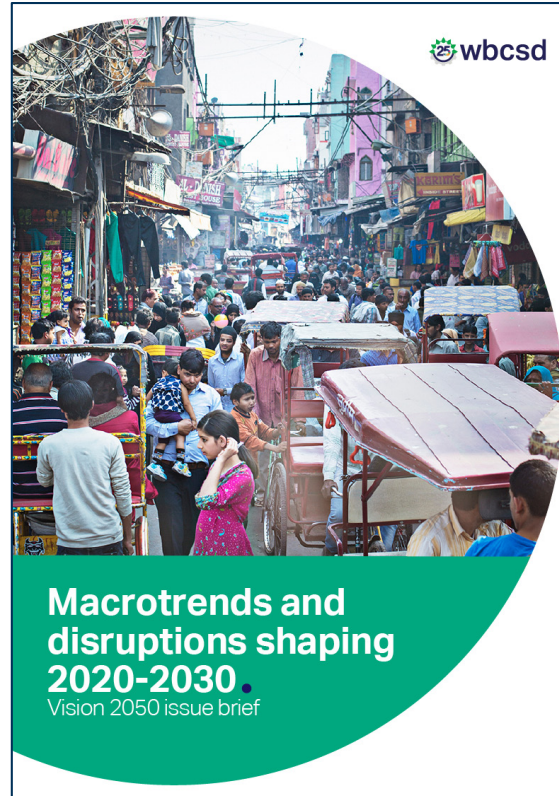
What trends can we see developing that have slightly weaker signals, that are slightly less certain (but nonetheless plausible) – and that if they do occur, have the potential to cause significant impacts, shocks, or disruptions – positive, negative or both?

Impact on
pathways to
Vision 2050

How will these macrotrends and potential disruptions impact sustainability challenges – intensifying or alleviating the challenges, as well as affecting our ability to make progress towards our vision of 9+ billion people, living well, within planetary boundaries?

Exploring the 2020-2030 Operating Environment

How macrotrends, disruptions and COVID-19 could shape the next decade



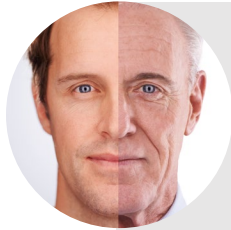
A wide, calm river flows through a valley. The river is the central focus, with a rocky bank on the left and a lush, green bank with trees on the right. In the background, there are rolling green hills and mountains, some with snow-capped peaks under a cloudy sky. The overall scene is a natural, scenic landscape.

Macrotrends

Think of Macrotrends as big rivers. Their course is largely set for the next 10 years, but they are far from static. When rivers flow where they are needed, their course can be managed and protected. But if looks as though they will erode valuable land, or their flow is being throttled, then action can be taken. In both cases, we need to monitor where the river is headed.

Key macrotrends emerging over the next decade

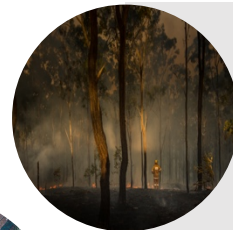
DEMOGRAPHICS



- 1. GENERATIONAL HANDOVER**
Political, economic, cultural & innovation power is shifting.
- 2. POPULATION GROWTH IN ASIA & AFRICA**
Sustaining geopolitical shifts and straining scarce resources.



ENVIRONMENT



- 3. WORSENING CLIMATE IMPACTS**
More frequent and more severe weather becomes harder to ignore.
- 4. LOCAL POLLUTION, DEGRADATION & SCARCITY CREATE IMPETUS FOR INNOVATION**
Loss, suffering, instability, displacement & innovation.



ECONOMY



- 5. SHORT-TERM CRISIS, LONG-TERM SLOWDOWN**
Under-investment, low productivity, weak demand and COVID-19.
- 6. PEAK GLOBALIZATION & THE RISE OF ASIA**
Rival blocs form as economic and political power pivots.



TECHNOLOGY



- 7. AUTOMATION IMPACTS EVERY INDUSTRY & COUNTRY**
Automation changes lives, industries and economies.
- 8. DATAFICATION, FOR BETTER & WORSE**
Smarter, more efficient, more surveilled – massive efficiency and productivity gains come at a price.



POLITICS



- 9. POLARIZATION & RADICALISM ON THE RISE**
High levels of dissatisfaction create appetite for radical alternatives
- 10. GEOPOLITICAL INSTABILITY**
Weakened multilateralism and nations in decline – the incentives for stability slowly fade away.



CULTURE



- 11. POST-MATERIALISM: ATTITUDES AND LIFESTYLES DIVERGE**
Changing aspirations are helping on-demand service models to spread globally.
- 12. CULTURE WARS ESCALATE**
Cultural clashes (young-old, rural-urban, rich-poor) contribute to polarization and in turn feed off it.



A photograph of a volcano erupting. A thick, dark plume of ash and smoke rises vertically from the crater, reaching high into the sky. The volcano's slopes are covered in grey ash and dark volcanic rock. The sky is a pale, hazy blue.

Disruptions

Disruptions are a bit like volcanos. We know the volcano is there, and we have tools by which to measure its activity and predict when it might erupt – but a lot of the impact will depend on which way the wind is blowing at the time. We can't control the volcano – but we can have a plan in case of an eruption to avoid the worst that the winds could bring.

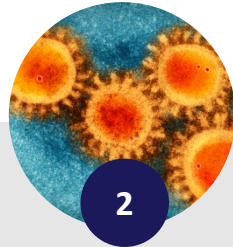
Potential “wild card” Disruptions



1

FINANCIAL CRISIS

How much will COVID-19 cost, and how will we pay when the next crisis comes?



2

GLOBAL PANDEMIC

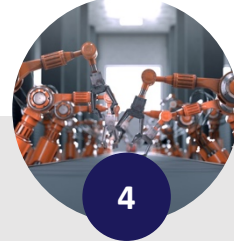
No country is fully prepared to handle a pandemic, and neither are any economies.



3

MAJOR CONFLICT

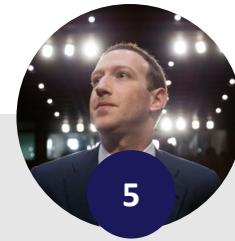
Cyber attacks, e.g. on critical infrastructure will touch all ordinary citizens in a conflict.



4

AN ECONOMIC “SINGULARITY”

What happens when new jobs can't be created where jobs have been destroyed?



5

SOCIETAL “TECHLASH”

Society sours on the costs of free tech, treasuries tire of lost taxes and competition.



6

POPULAR REVOLTS LEAD TO REGIME CHANGE

Inequality will continue to rise making more frequent and severe protest likely.



7

A CLIMATE “MINSKY MOMENT”

Costs, disclosures, social pressures all reorient financial flows – but how fast?



8

ENERGY TRANSITION TIPPING POINT

Market forces lead to fossil fuel demand peaking and the energy transition accelerates.



9

BIOTECH BOOM

Disruption comes to food, health and materials as biotech's potential emerges.



10

GLOBAL GREEN (NEW) DEAL

Citizens embrace the chance to improve jobs, communities and environments.

2020-2030 Operating Environment & COVID-19 consequences

Materials available from WBCSD

The 2020-2030 Operating Environment

- [Vision 2050 issue brief: Macrotrends & Disruptions shaping 2020-2030](#)
- [Underlying research in support of 2020-2030 macrotrends & disruptions](#)
- [Summary presentation slides](#) (this document)
- Webinar: “Where next: key trends & disruptions for the decade ahead”
 - [Macrotrends](#) and [Disruptions](#)

Long-term consequences of COVID-19

- [Vision 2050 issue brief: The consequences of COVID-19 for the decade ahead](#)
- [Summary presentation slides](#)
- Webinar: “[The consequences of COVID-19: what the pandemic means for the decade ahead](#)”

Follow our virtual meeting series to learn about the sustainability challenges business is focusing on and how it is responding to COVID-19 <https://events.wbcd.org/virtual-meetings/>

COVID-19 Response project

Next outputs from the Vision 2050 project on long-term resilience

The future of capitalism

- Vision 2050 issue brief: COVID-19 catalyzes a systemic shift towards stakeholder capitalism

Long-term Resilience Guidance

- Vision 2050 issue brief: Making sustainable business more resilient to future shocks

Health & Wellbeing Scoping

- Working with members, using the Vision 2050 Refresh Health & Wellbeing pathway as a foundation, scoping the objectives and necessary partners for a new WBCSD Health project.





wbcspd



Vision 2050 Refresh.



Thank you.
Stay safe.

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www.wbcspd.org/Overview/About-us/Vision-2050-Refresh