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Global Megatrends

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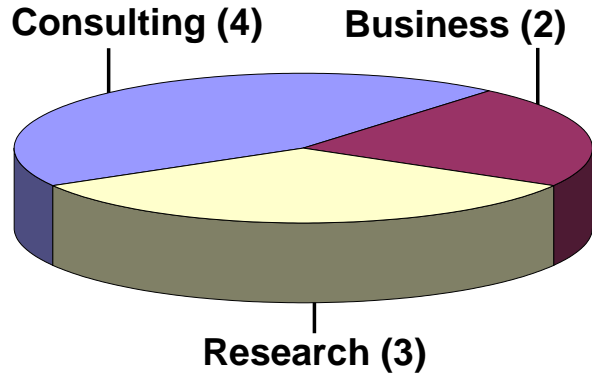


1. **Introduction**
 2. Global Megatrends
 3. Implications for Organisations
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Introduction: What are Megatrends?

- Megatrends **shape future markets**
- Three characteristics in which megatrends differ from other trends:
 1. **Time Horizon:** Megatrends can be observed over decades. They can be projected at least 15 years into the future.
 2. **Reach:** Megatrends impact comprehensively on all regions and societal subsystems, whether in politics, society, or economy.
 3. **Intensity of impact:** Megatrends impact powerfully and extensively on all actors, whether it is governments, individuals and their consumption patterns, or corporations and their strategies.
- Megatrends are **long-term processes of transformation with a broad scope and a dramatic impact!**

Introduction: Megatrends of the future



Publishers

- Fraunhofer Society (2010)
- Ernst and Young (2009)
- Credit Suisse (2009)
- Horx (Future Institute) (2009)
- Z_Punkt Foresight (2009)
- Roland Berger (2009)
- Allianz Dresdner Economic Research (2008)
- Gundlach Consulting (2008)
- Steria Mummert (2007)



Which Megatrends have the biggest influence on global development in the upcoming 20-40 years?

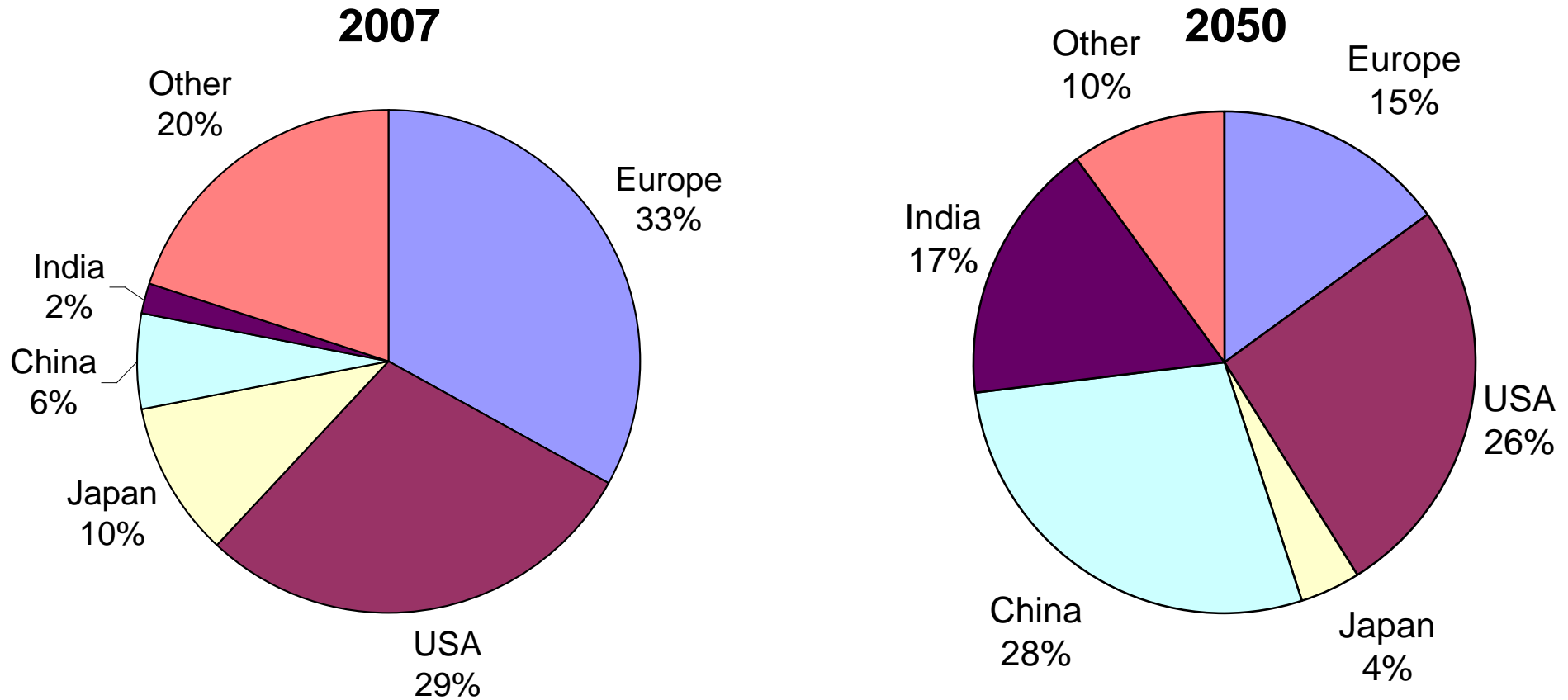


1. Introduction
2. **Global Megatrends**
 - Globalisation
 - Demography
 - Environment
 - Health
 - Technology
3. Implications for Organisations

Megatrend 1: Globalisation

- Driving forces behind globalisation:
 - Liberalisation of global trade and financial markets
 - Decreasing costs for communication and transportation (due to technical innovations)
- The BRIC states (Brazil, Russia, India & China) are still the major players concerning global growth
- Global spread of value creation: network economy, (utilization of local economies), increasing mobility and flow of goods

Shift to Asia: Shares in global economic output

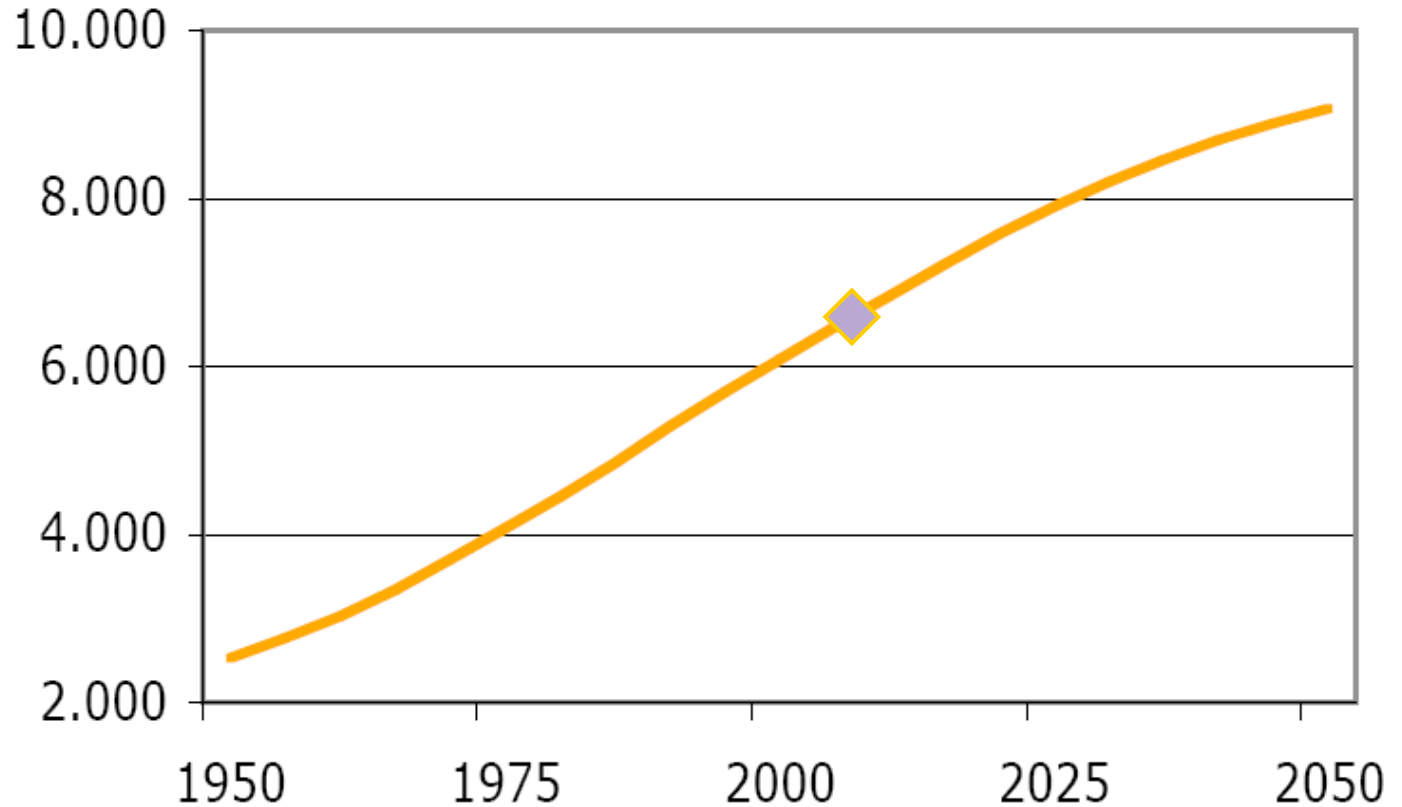


Source: Asian Development Outlook, Hess (2008)

Megatrend 2: Demography

- Global population is increasing dramatically
- up to 9 billion people in 2050

Global Population: 1950 – 2050 (in Mio.)

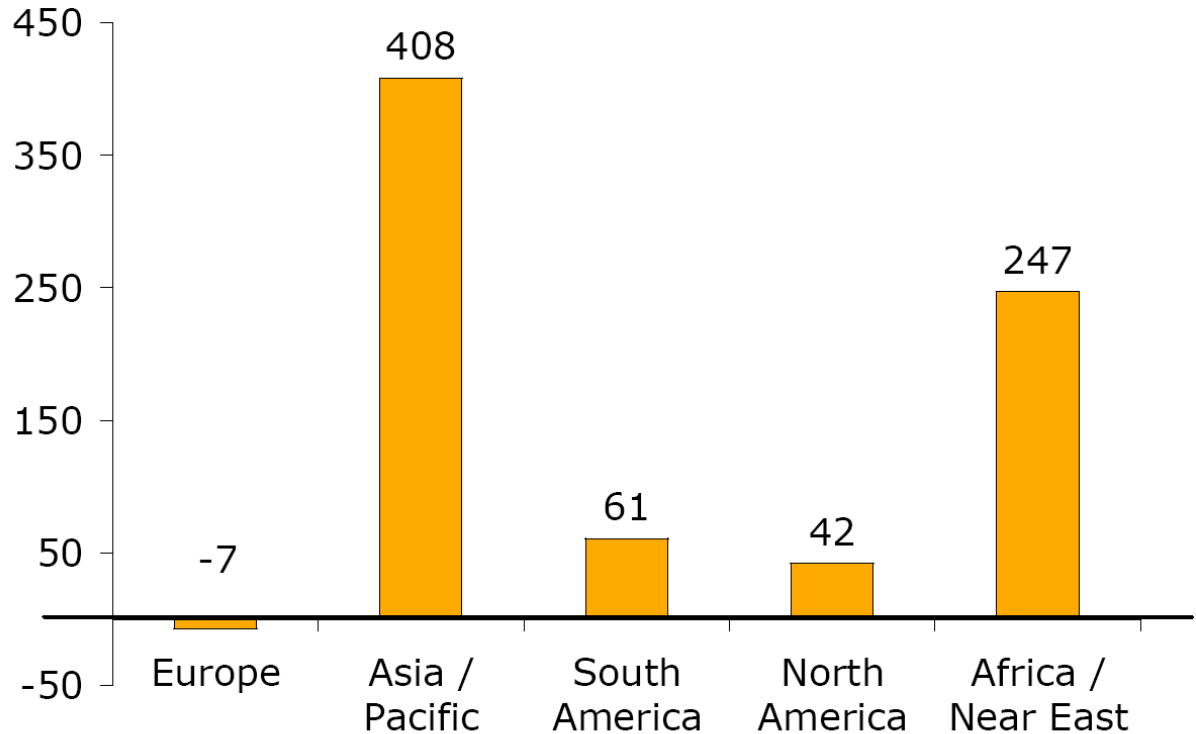


Strong regional differences:

Shrinking Society in the West and High Birth Rates in Developing Countries

- 95% of the population growth until 2050 in developing and emerging countries
- In contrast, the population in industrialized and some developed countries will decrease
- As a consequence and because of shortage in commodities such as water, migration from poorer to richer countries will rise

Growth in Mio. 2005-2015

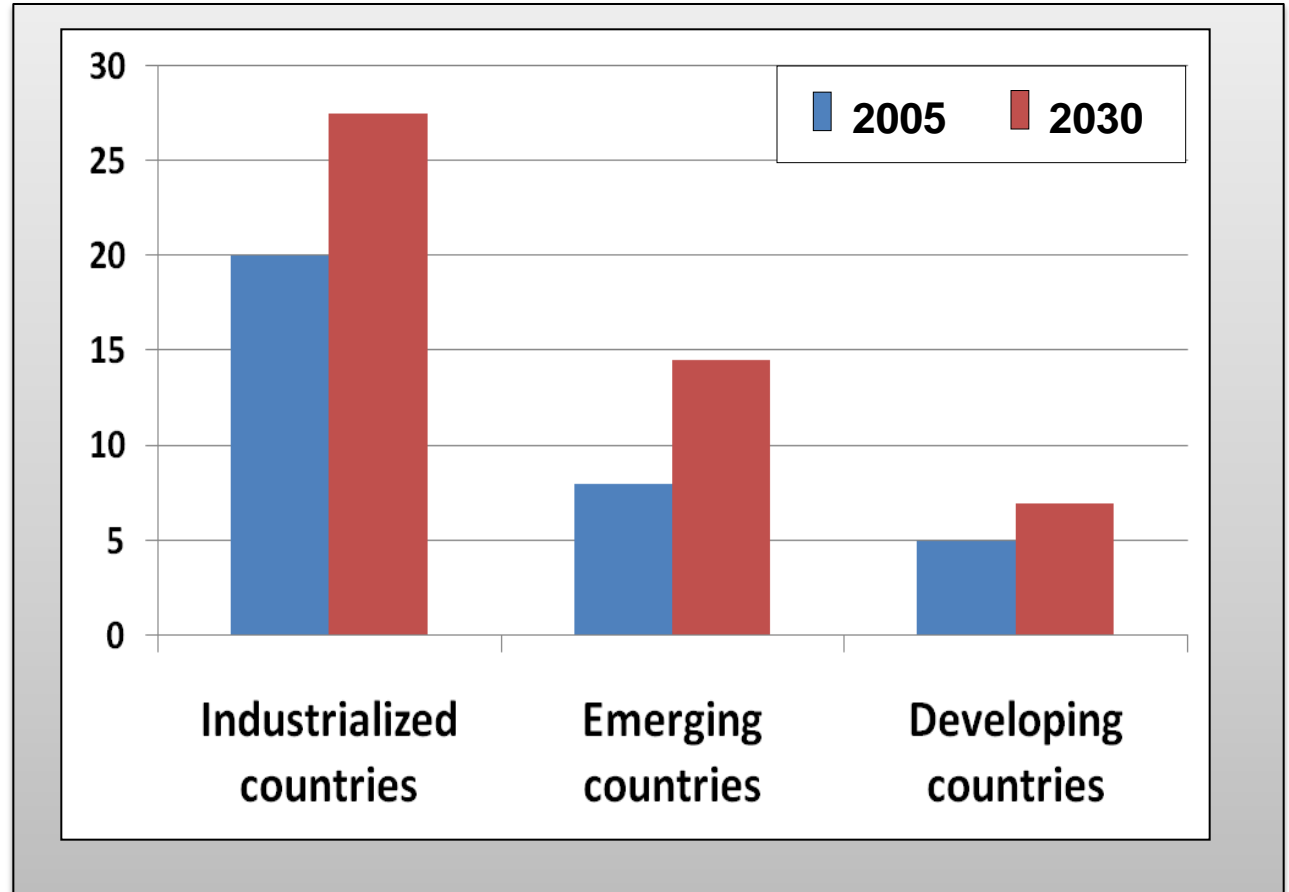


Increase and Ageing of World Population

Challenges for companies:

- Silver Markets: Main growth for consumer products and services in the field of health and leisure (“Best Agers”)
- Internal challenges: brain drain, health management and diversity management

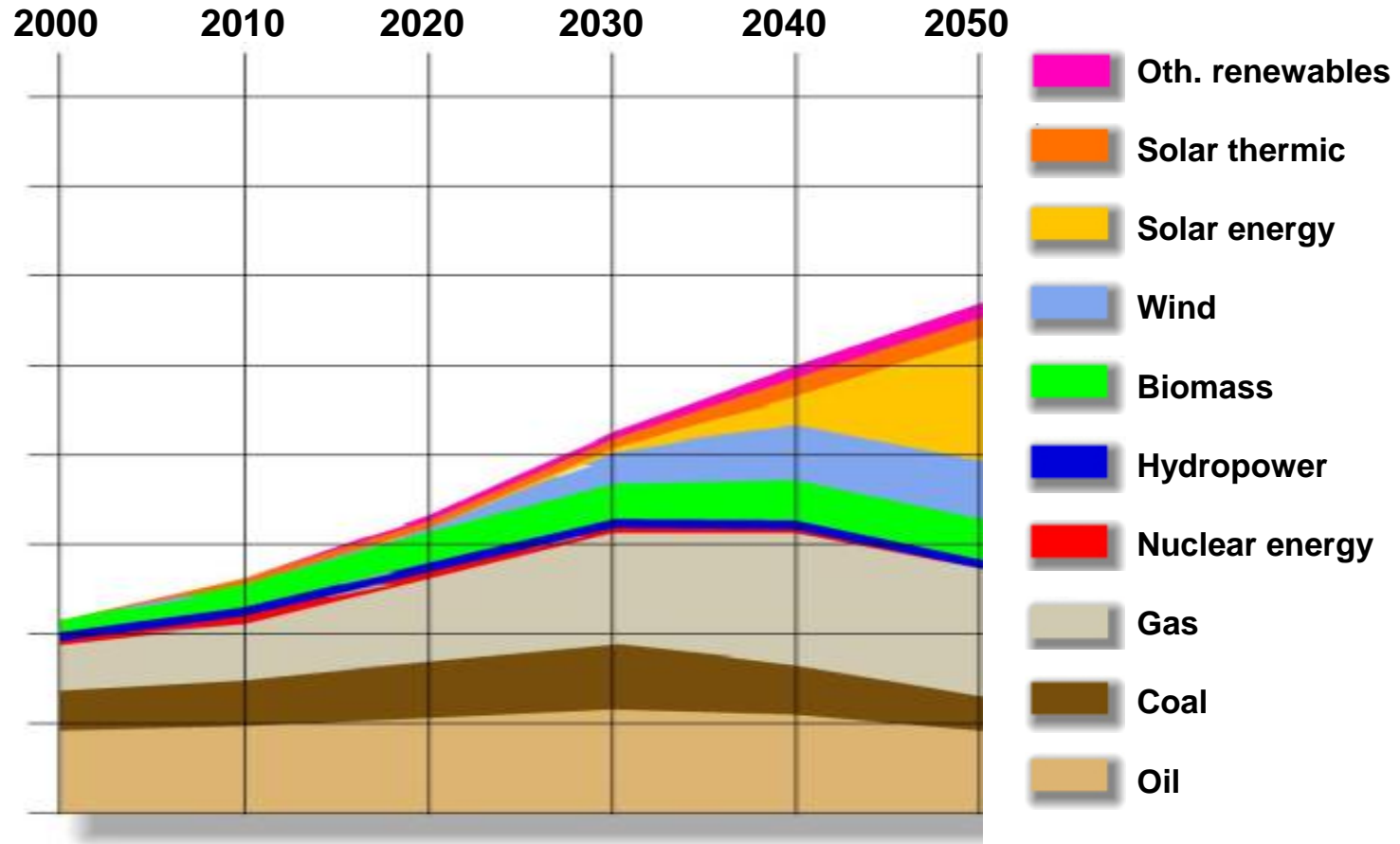
Share of the Population aged over 60



Megatrend 3: Environment

Changes in energy demand and energy mix 2000 - 2050

- Increasing energy consumption
- Fossil fuels are still important
- Use of Alternative Energy Sources and Renewable Fuels is increasing
- Solar power will become the most important energy source on the globe.



Source: Advisory Council of German Government (2009)

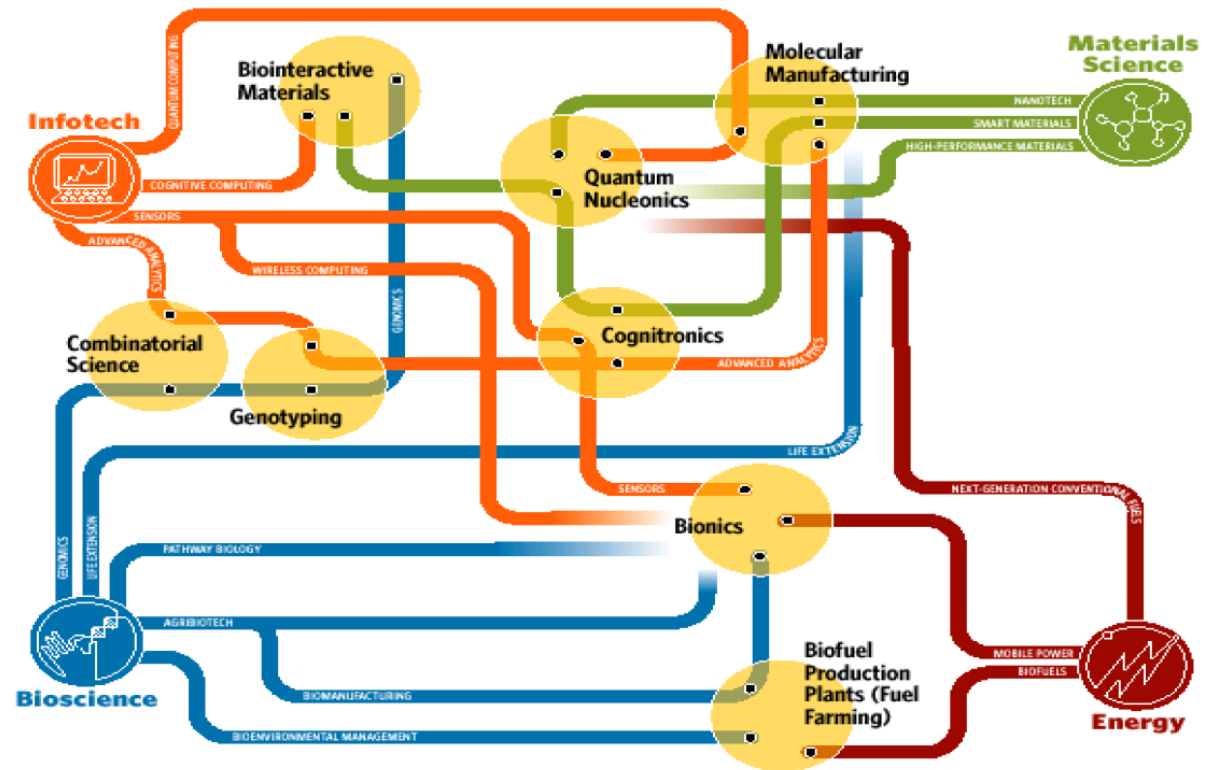
Megatrend 4: Health



- Worldwide the level of medical care increases
- Rising Health Costs – especially in industrialized countries (financial deficits in welfare system); eldercare and chronic diseases
- Increasing personal responsibility (e.g. health prevention)
- From Keeping Well to Health Style – new markets: nutrition (novel food), pharmaceuticals, cosmetics

Megatrend 5: Technology

- **NBIC-Paradigm:** convergence of technologies and research fields (nano- und biotechnology, information technology and cognitive sciences)
 - Miniaturizing of technologies (nanotechnology)
 - Biotechnology
 - Robotic and Bionics
 - Ambient Intelligence
 - Cloud Computing





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Organizations must consider megatrends within in the long-term strategic planning.



Note: for different industries – different megatrends are relevant!

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Thank you for your attention!

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