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# Global Megatrends

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Latest GBN Publication

# Content

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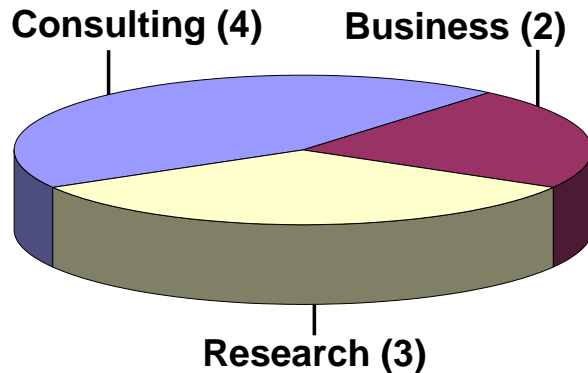
1. **Introduction**
  2. Global Megatrends
  3. Implications for Organisations
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## Introduction: What are Megatrends?

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- 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?***

# Content

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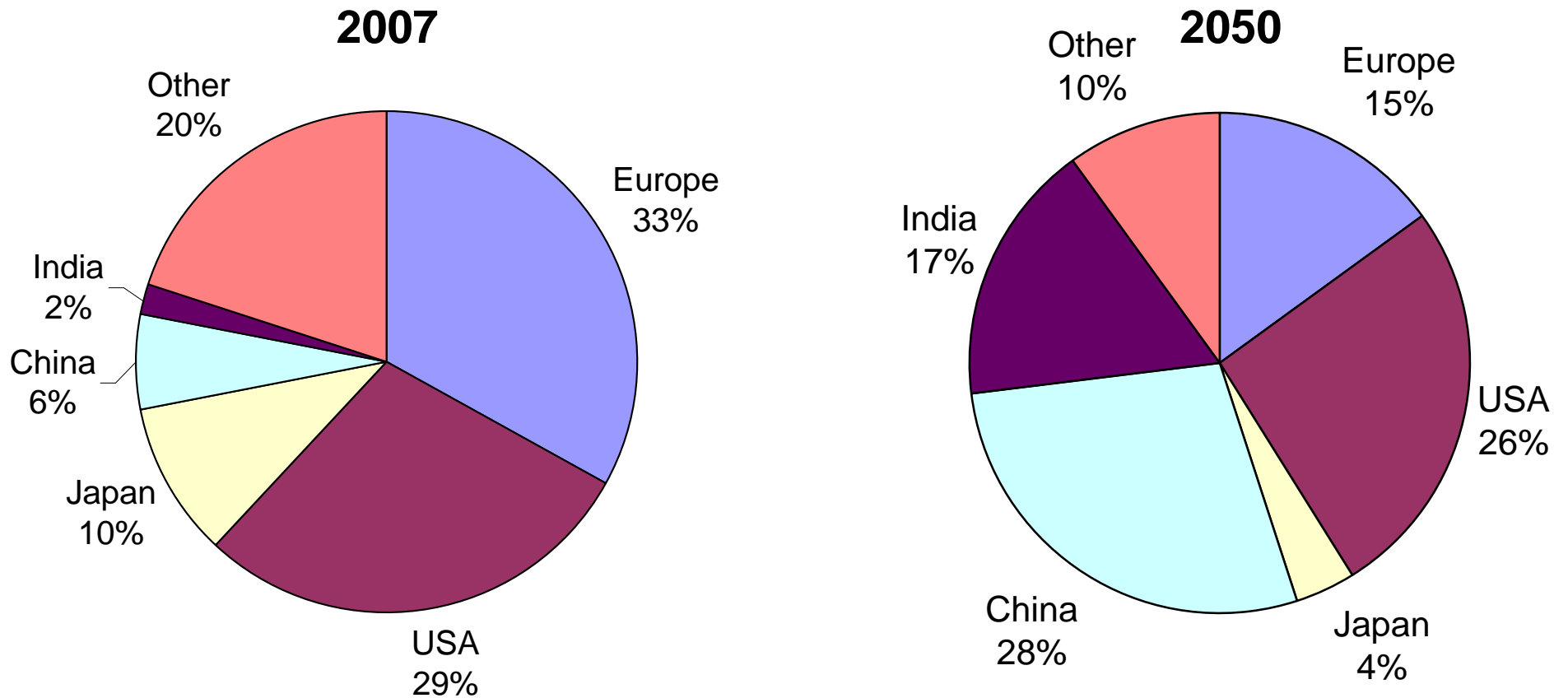
1. Introduction
  2. **Global Megatrends**
    - Globalisation
    - Demography
    - Environment
    - Health
    - Technology
  3. Implications for Organisations
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## Megatrend 1: Globalisation

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- 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

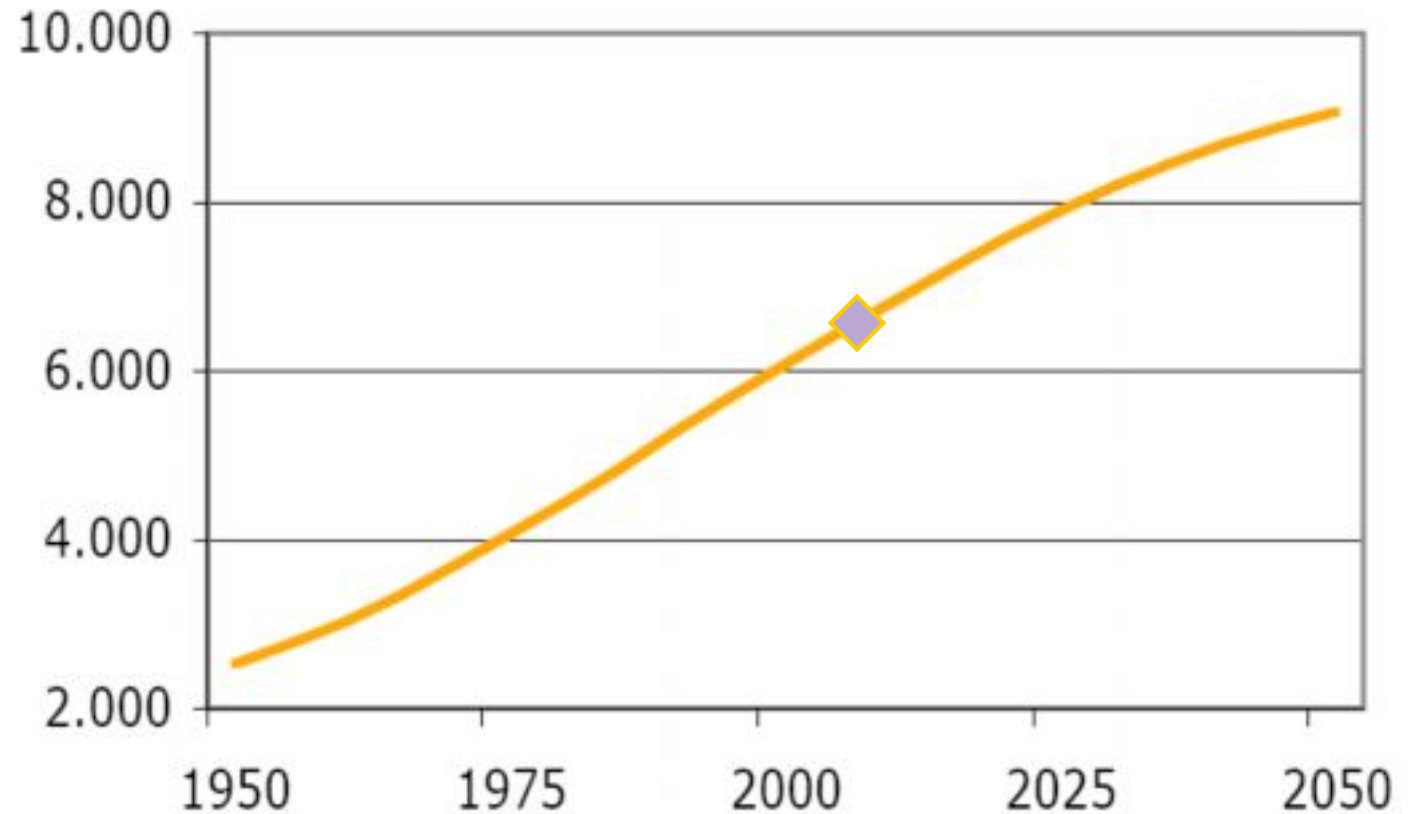


Source: Asian Development Outlook, Hess (2008)

## Megatrend 2: Demography

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

Global Population: 1950 – 2050 (in Mio.)

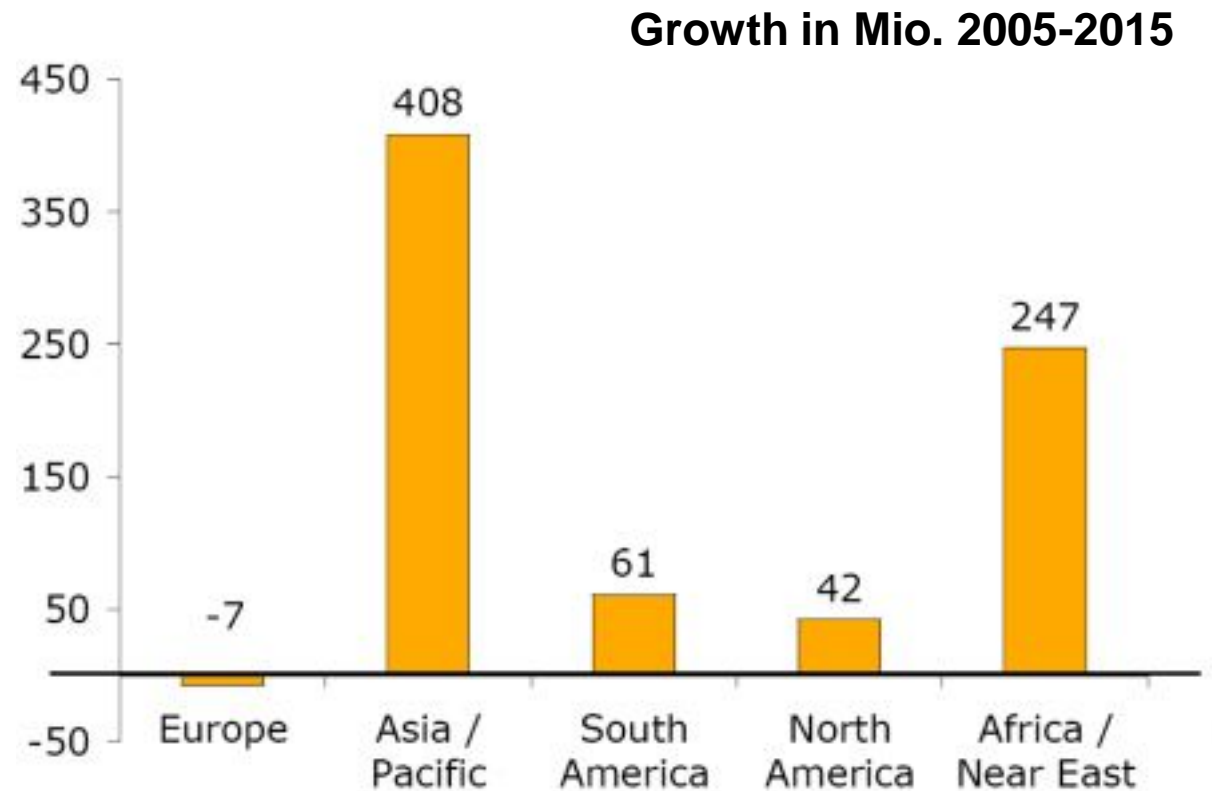




### Strong regional differences:

#### *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

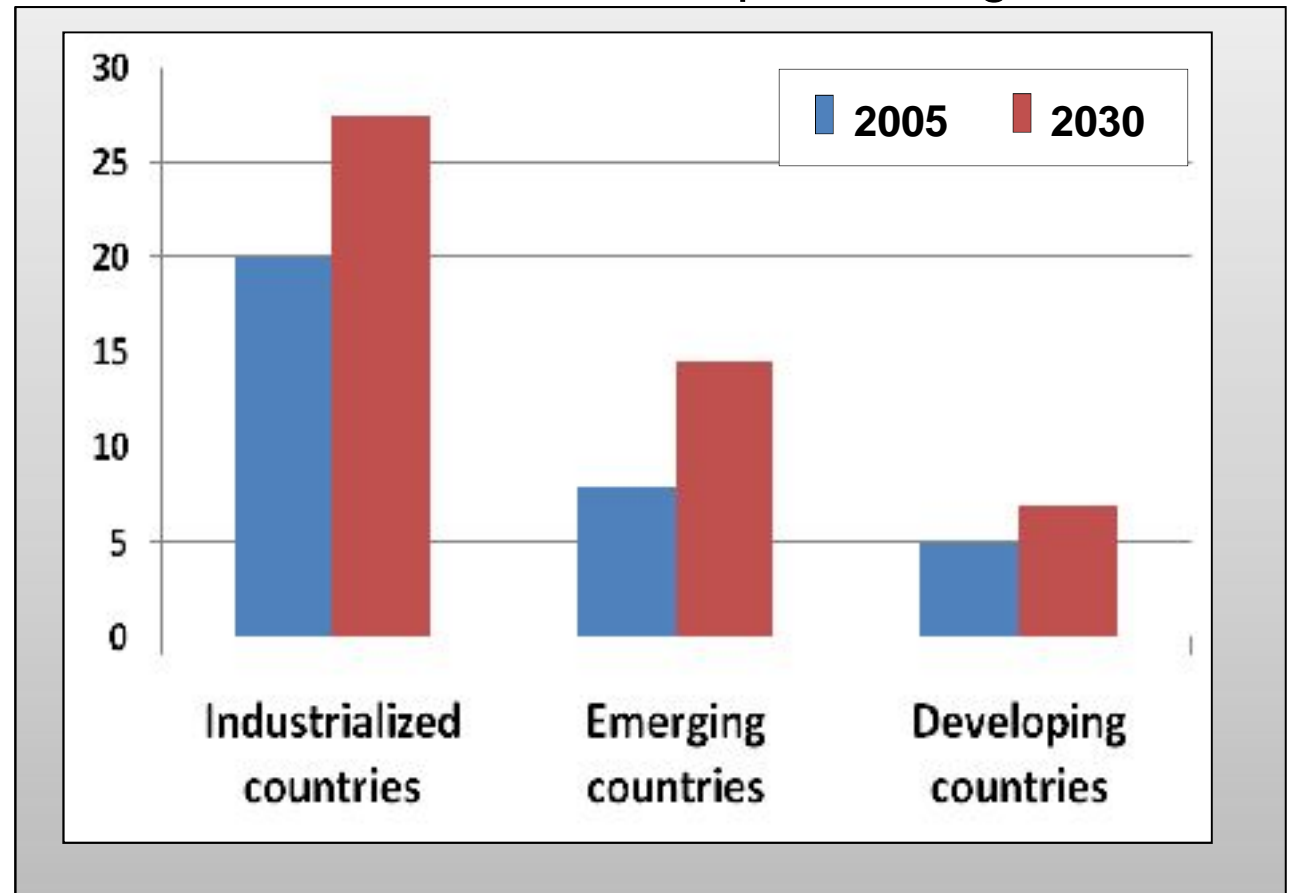


### ***Increase and Ageing of World Population***

#### Share of the Population aged over 60

#### **Challenges for companies:**

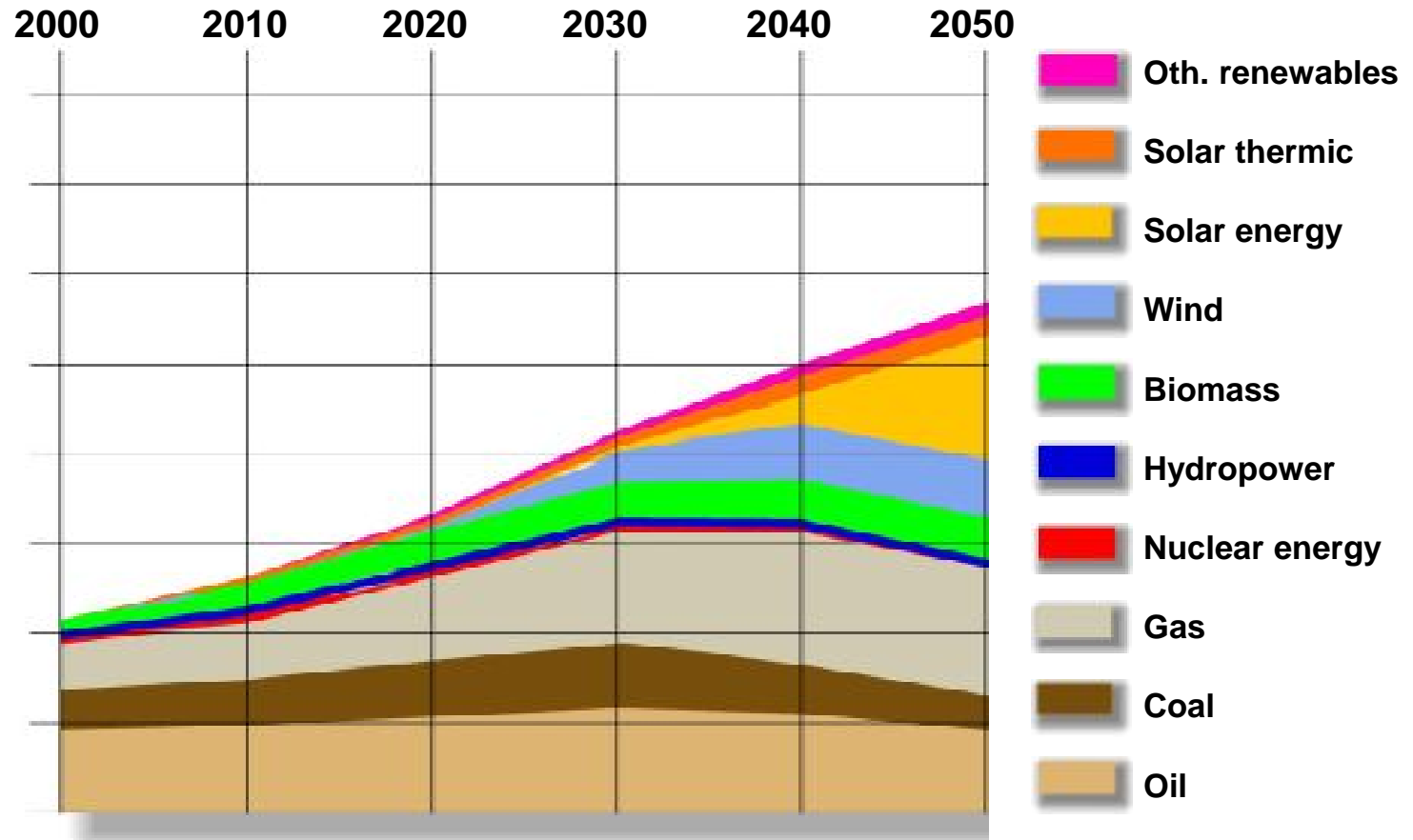
- Silver Markets: Main growth for consumer products and services in the field of health and leisure (“Best Agers”)
- Internal challenges: brain drain, health management and diversity management



## 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 3: Environment

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- Rising CO<sub>2</sub> Emissions and Temperatures
- Environmental Problems in Emerging and Developing Countries a Risk Factor
- More Investment in Clean Technology: Environmental technologies can become key drivers for economies
- Efficiency Revolution Continues: Scarce resources and increasing commodity prices lead to techniques that increase energy and resource productivity (incl. recycling)

## Megatrend 4: Health

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- 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



# Content

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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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