Study (abridged version)

THE FUTURE OF VALUES HELD BY PEOPLE IN OUR COUNTRY

A summary of key findings and scenarios

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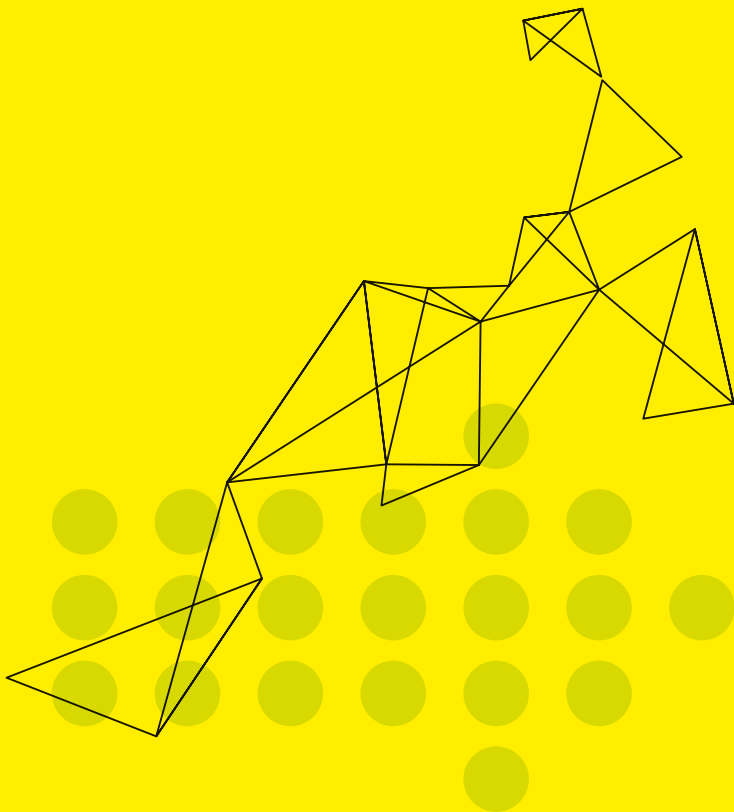Cordula Klaus
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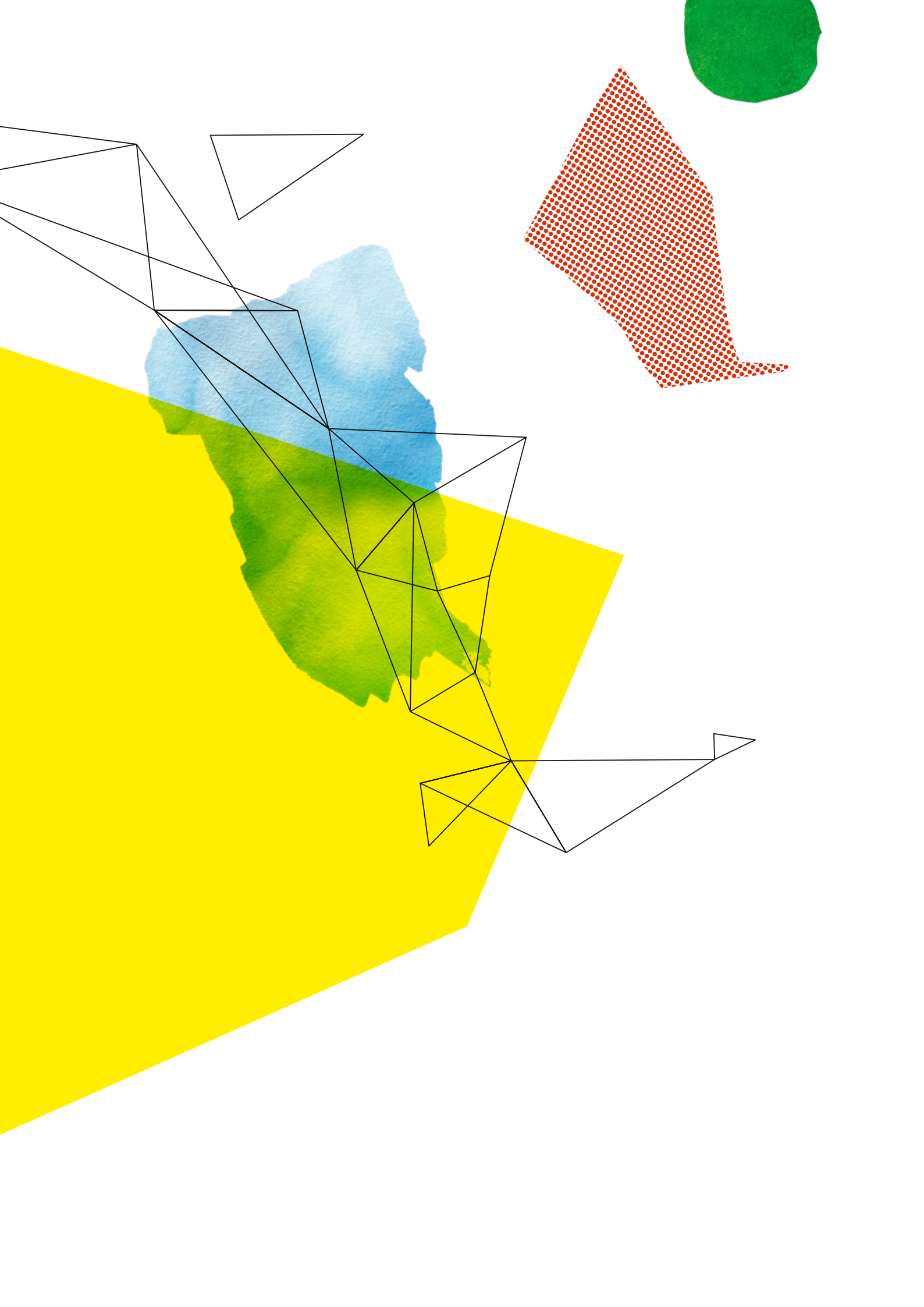Michael Astor

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Summary of key findings

i Objective of the study

The findings of this study do not constitute forecasts or final answers to the questions posed by the study. Instead, they seek, for the purpose of strategic foresight, to illustrate a broad spectrum of possible future scenarios and development paths – and thus stimulate a discussion about the future. As such, the results are, amongst other things, designed to provide an interpretive framework for further studies and findings, i.e. to enable the classification of trends and sociopolitical connections within the three-year foresight process.

A current desire for a society of solidarity

The empirical findings relating to the present indicate that the respondents are overwhelmingly united in one aspect, irrespective of certain characteristics: they hold a strong desire for a fair society based on solidarity, a society that promotes social cohesion and balances out social disparities. When considering society as a whole, however, the respondents affirm that the current trend is negative. Due to the anticipated widening of the gap between rich and poor, different ways of structuring social participation and a political arena that seems far removed from people's everyday lives, people are retreating into their private sphere. As such, they do not expect that their wish for a fair society based on solidarity will be fulfilled by society as a whole in the future.

But social cohesion is weakening

The participants do not apply the perception of fewer social ties and a predominance of materialistic attitudes to their own lives, but rather transfer this to a societal level. Ultimately, very few of them perceive propagated negative societal trends in a tangible way in their own immediate environment; instead, they identify such trends on a macro scale, i.e. on a greater societal level. It may be that a distorted and exaggerated adverse perception of society, driven by the media, is being witnessed here. On the one hand, the empirical findings relating to the present clearly indicate that participation is always dependent on the available

resources; this not only relates to income, but also to people's social capital, which, in turn, is the result of a values-based environment and education.

A discrepancy between people's own lives and their view of society

This raises the following question: how can the paradox between self-perception and perception of others – and, crucially, the negative perception of society – be explained? The findings highlight the fact that respondents are observing segregation between individual sections of society. Digital media and tools, for example, are increasingly shaping interaction within society; this harbours risks related to the disconnection of individual, ever more atomised social groups who become entrenched within their bubbles. This perceived segregation results in differentiation in terms of people's self-image and their image of others. People regard themselves as immune to certain societal developments, whilst believing that these same developments drive the actions of other people.
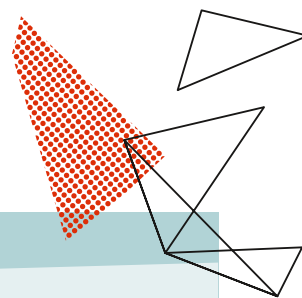
Values allow scope for interpretation

Ultimately, the highlighted contradictions also illustrate that, from the people's perspective, it is often not the values themselves that are drifting apart, but rather what the values mean. A redefinition of a value's meaning, while still attaching equally high importance to the underlying value, is not acknowledged and is mistakenly interpreted as a decline in values. In turn, this 'non-understanding' is interpreted as value divergence and a coming apart of cohesion and/or a non-reconcilable heterogenisation of values. This is supported by the fact that age is the most significant characteristic when it comes to evaluating diverging values. Social cohesion, i.e. a sense of togetherness, is important for seamless societal interaction and a plurality of values. The need for a new culture of togetherness is clearly reflected in the desire for a fair society based on solidarity. This insight is backed by a host of recent studies on values in Germany. What remains unanswered, however, is the question of how such a culture of togetherness manifests itself and who is supposed to come together.

Values are both the start and end point for societal processes of negotiation

The process of negotiating values and their meaning is particularly important in light of the fact that values bring together the body of societal norms and are therefore crucial in terms of shaping the society of the future and, therefore, in terms of changing the values landscape. The key factor is whether this conflict can be resolved in a way that is supported – or at least accepted – by a broad majority of the population. By its very nature, however, an analysis of the status quo can only ever be a snapshot, especially when it comes to expectations for the future. Subjective future expectations are always shaped by the zeitgeist, by prevailing narratives and by the current situation. However, a general 'unease' concerning the present can – but will not necessarily – serve as a starting point for sweeping societal transformation dynamics.

Universal models of value change are not identifiable

The potential future possibilities outlined in the scenarios clearly illustrate that the issue of changing values – along with the future generally – is subject to considerable uncertainty and, depending on societal dynamics, could develop in wildly different directions. In the words of Canadian science fiction author William Gibson: 'The future is already here — it's just not very evenly distributed.'[1] With this in mind, it is possible to identify signals of varying strength that point to the plausibility of all six scenarios. The (future) realm of values may – depending on a variety of context-specific factors and, in particular, the socio-economic background of individuals – take on various forms. Therefore, one possibility is a coexistence of values and behavioural patterns within a narrow social environment, especially in a pluralistic society. This is illustrated with particular clarity by the alternative scenarios outlined.

Alternative futures comprise a broad spectrum of possibilities

Within the context of alternative futures, it is possible that the societal pessimism affirmed in the status quo analysis will be overcome and transformed into a new societal optimism of various kinds (scenarios 1, 2 and 6), but also that the pessimism will become a catalyst for a downward spiral (scenario 3). The desire for a new sense of togetherness could also be channelled in very different ways across society. It may remain a desire within a highly polarised society (scenario 4); however, the new sense of togetherness could also be achieved via a strengthening of local communities (scenario 6), a new dynamic of European integration (scenario 1), a tight guidance framework (scenario 5) or via isolationist processes (scenario 3) – without fully exhausting the range of possibilities.

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[1]   National Public Radio (2018).

1
INTRODUCTION
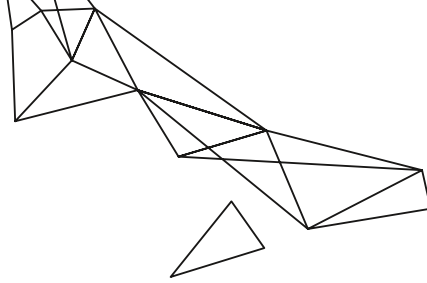
The role of Strategic Foresight is to anticipate technological, economic, legal and geopolitical developments at an early stage, understand the links between them and identify fault lines. Consequently, the unit not only monitors and analyses scientific/technological trends, but also identifies societal developments and their associated transformation processes and examines their impact. Science, research and technological development are explicitly regarded as processes that interrelate with political, economic, societal and cultural phenomena. On the one hand, these phenomena are subject to longer-term development trends and path dependences. On the other hand, one-off events – such as the September 11 attacks, the Fukushima nuclear disaster or the coronavirus pandemic of spring 2020 – can unleash transformative forces. The actions of actors are based not only on these external circumstances and rational decisions, but are also embedded within a framework of cultural conditioning, values, attitudes and interests. Modern societies are not only characterised by a variety of lifestyles, but also by a plurality of values. This influences not just individuals, but also the actions of social groups and societies. For this reason, the third Foresight Process of the Federal Ministry of Education and Research (BMBF) is getting under way with a study on the future of values.

The debate on shifting values gained momentum in the 1970s – partly on account of the publication of Ronald Inglehart's 'Silent Revolution'[2] model on changing values in western societies – and, at the same time, was put on an empirical/scientifically sound footing. It became clear that, over time, values have a certain degree of permanence and are also subject to change. First and foremost, this change derives from the fact that values are reinterpreted or – against a backdrop of different societal developments – 'rebooted'. The value of 'family', for instance, may undergo a change of meaning depending on the range of people included within it. For example, the nuclear family, the traditional extended family and new combinations based on blended families and same-sex couples with children all represent different versions of the social reality without necessarily being accepted by everyone to

the same extent or being recognised as a value, even though they regard the value of 'family' as a key factor guiding their actions.

The main reason for starting a Foresight Process with a study on changing values is that a current snapshot of the state of society is required to enable analysis of future developments. This snapshot describes the current social value context underpinning actions and, looking ahead, outlines possible future scenarios. As such, the status quo analysis is combined with an established foresight method. The particular strength of this method lies in its ability to describe and discuss trends that, from today's standpoint, are seen as less likely and potentially disruptive as potential development routes. The impacts of the Covid-19 pandemic in spring 2020 provide emphatic proof of how dramatically social life can change within an extremely short period of time, but also how the resources of medical and epidemiological research can be be focused so directly on an individual phenomenon. This confirms an old socio-technological finding: 'The development and implementation of technology are incorporated within processes of negotiation, decision-making, selection, omission and prioritisation.'[3] Negotiation and decision-making processes – to focus on just two of the above – are, in turn, embedded within social frames of reference that are built on interests, societal goals (missions) and, indeed, values. The close links between these interaction processes and the social context and the permanence of values within society lead, in turn, to a narrowing of the geographical focus on the national context.

[2]   Inglehart, Ronald (1977): *The Silent Revolution: Changing Values and Political Styles among Western Publics*, Princeton.

[3]   Schachtner, Christina (1997): *Die Technik und das Soziale.* An introduction to: Schachtner, Christina (editor) (1997):
       Technik und Subjektivität. Das Wechselverhältnis von Mensch und Computer aus interdisziplinärer Sicht, Frankfurt, p. 13.
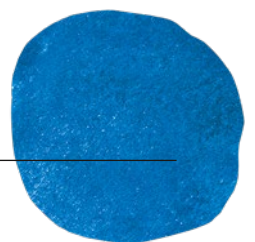
Against this backdrop, the values study draws on a broad methodological repertoire, but relies chiefly on the collection of its own data set and the development of exploratory scenarios in order to meet the requirements of a fundamental study for the ongoing Foresight Process. In particular, considering the future represented a methodological challenge. Respondents often found it difficult to free themselves from their experiences of the present and thus anticipate different development routes or grasp the complexity of value-related societal changes. In order to nevertheless achieve meaningful insights, a distinction was drawn in the survey between individual viewpoints and the values that are perceived as guiding the actions of society. As such, it was possible to separate the former from the latter. The findings of the survey clearly indicate that the respondents recognise different development routes in this regard and can differentiate between desired and expected routes. Therefore, this analytical part of the study has direct relevance for the future. The scenarios describe a deliberately broad spectrum of possible futures. On the one hand, they exhibit significant differentiation in order to broaden the spectrum of possibilities and, on the other, serve to examine possibilities that are regarded as less likely from today's standpoint. Fundamentally speaking, they offer a range of platforms for reflecting upon societal development and therefore the evolution of values in different contexts.

The methodological work was carried out between July 2019 and December 2019 and therefore before the Covid-19 pandemic in spring 2020. In light of the profound changes that have clearly been brought about by the crisis, this study will be revised in spring 2021. The final impacts of these changes and the consequences for the future are extremely uncertain and can only be anticipated to a limited extent. Many developments and trends that had already started to emerge before the pandemic are, at the very least, being ostensibly accelerated. It is currently unclear which developments will take hold in the long term and which will not.

The methodological approach of this study enables nuanced evaluations and an analysis that receives insufficient attention in many studies: a consideration of, and reflection upon, different futures. Therefore, this approach and the results of the study offer many starting points for a subsequent analysis of the coronavirus pandemic. In the scenarios, certain potential developments for a post-coronavirus future – such as the broad use of surveillance technologies (i.e. the coronavirus app) – are already explored. Emerging as one key finding of the empirical research is the desire amongst participants for a fair society based on solidarity and for politics geared towards people's needs – a topic that has prompted much debate in connection with the coronavirus pandemic. Societal and technological aspects that are currently the subject of discussion are therefore picked up on by the study – albeit in different contexts – and thus offer a strong launchpad for examining future changes.
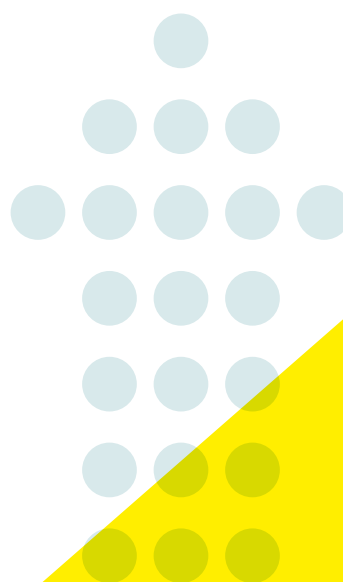
2
SUMMARY OF KEY FINDINGS: TODAY'S LIFE GOALS AND THE HOPES AND FEARS FOR THE WORLD OF TOMORROW

What motivates today's society? What are people's aspirational life goals in the here and now? And what are their desires for the future? The analytical summary of the CAPI-based survey conducted for this study – coupled with selected studies and data sets, interviews with experts and a focus group with young people – offers an insight into today's values landscape, the developments witnessed in previous years and people's desires and expectations for the future from today's standpoint. The descriptions of values and value groups encompass ten value groups:

Social value group:

Social values are values such as 'sense of family' and 'friendship'. In other words, values that describe affinity and contact with other people (especially attachment figures) and/or the social environment.

Awareness-related value group:

This value group focuses on a conscious and mindful lifestyle, as well as consideration for oneself and one's immediate environment. It's all about being guided by one's feelings. Values such as 'environment', 'health' and 'sustainability' take precedence.

Community-oriented value group:

Community-oriented values describe areas that seek to foster the cohesion of groups or even entire societies. The focus is on overall cohesion, a willingness to help others and tolerance of others (solidarity, equality, fairness, as well as intergenerational fairness and tolerance/respect for fellow members of society).

Self-determination-related value group:

Values within this group fall within the category of liberalism. They are primarily liberal values that facilitate self-realisation above and beyond societal constraints and dependencies, as well as self-organisation. Self-determination-related values often stand in contrast to the value of (national political) security. Independence, which in turn enables self-determined actions, applies within the context of different areas of life (e.g. independence from family, financial independence and politically guaranteed independence).

Politically oriented value group:

Politically oriented values comprise a broad spectrum in the area of engagement and responsibility. One area of focus is values that seek to promote personal responsibility. However, this group also includes values that describe active or passive political engagement (e.g. participation or being politically informed).

Performance-related/materialistic value group:

In particular, performance-related/materialistic values reflect a person's career situation/goals and standard of living. Typical values include 'performance', 'standard of living' and 'success'.

Hedonistic value group:

Hedonistic values are those that equate to a lust for life (e.g. lust for life, adventure, fun, curiosity, excitement). In its unadulterated form, hedonism is now sometimes associated with negative connotations. This is due to the assumption that it equates to an egotistical, excessive and exaggerated form of pleasure.

Norm-oriented value group:

Norm-oriented values are often the values that lend
a society stability. These values include 'security' and
'respect for the rule of law'. Security is often discussed
as a counterpoint to freedom – and vice versa. Security
can play a role in many different areas.

Creative value group:

First and foremost, creative values relate to values
connected with being open to new things (e.g. to tech-
nology), creativity and open-mindedness and fields
of innovation.

Traditional value group:

Traditional values are values such as religion, conserva-
tism and national pride (i.e. values that were extremely
important in times gone by, but that have since signifi-
cantly declined in importance).

For a large majority, social values are particularly
desirable on a personal level (see Figure 1), with
self-determination-related values also coming very
high up on the desirability scale. Awareness-related
and community-oriented values have grown (consid-
erably) in importance, but are nevertheless assessed
differently depending on respondents' socio-economic
backgrounds. In particular, the former are character-
ised by a discrepancy between action and desirability.
Whilst gainful employment and performance remain
important, they are subject to a comprehensive rethink.
The different emphases set by people reflect a nuanced
evaluation of work; on the one hand, there is an em-
phasis on the meaningful aspect, (career) success and
performance as a reasonable way of achieving social
recognition; on the other hand, there is a fear of the
consequences of increased workloads, which is articu-
lated as a desire for less performance pressure. *Having
a good life* is a fundamentally important value for most
people, although it tends not to mean pure hedonism.
Hedonistic characteristics are increasingly being mixed
with other values, e.g. the search for 'meaningful' work.
Politically oriented values are experiencing an upswing.
In particular, greater personal responsibility (including
in areas previously regulated by politics) is regarded
as extremely desirable by a broad spectrum of society.
Whilst (active) political engagement is also becoming
more important – and, in some cases, is even fashion-
able amongst young people – it remains low on the
list. In terms of their weighting, norm-oriented values
are both highly dependent on individual events and
context-dependent. They fluctuate accordingly, but are
currently on the rise. People are open for new inno-
vations in the field of technology, provided they feel
able to decide for themselves when technology is used
and provided they understand the rationale behind the
technology. Otherwise, technological scepticism often
gains the upper hand. Traditional values still occupy
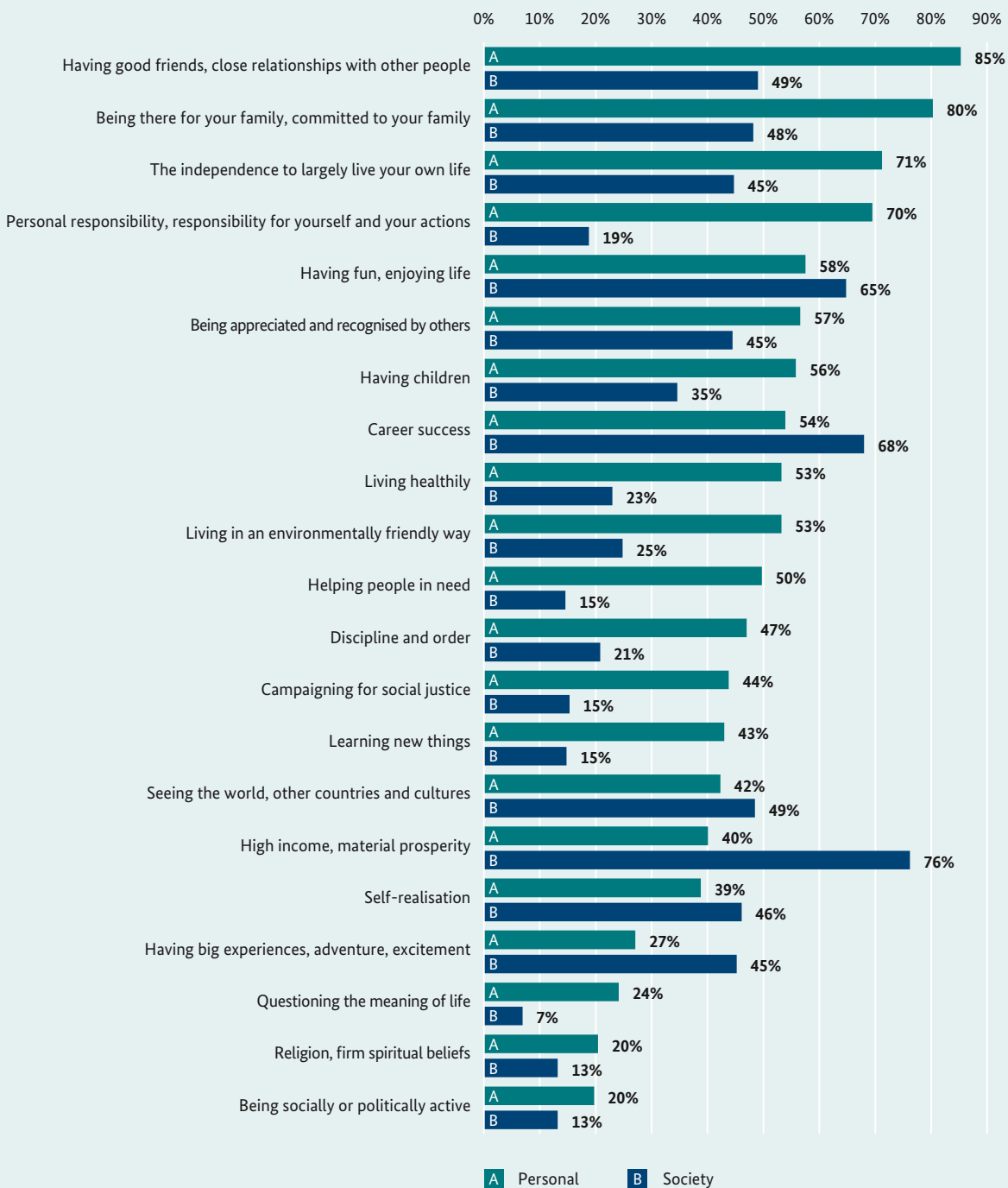the bottom position on the scale.

Figure 1: Individual and widespread societal values of today

Basis: Federal Republic of Germany; population aged 16 and over; N=1,298

Questions: Individual values: *This list includes various aspects that may be considered important and desirable in life. Would you please tell me what you consider to be especially important? (Presentation of list)*
Societal values: *In your opinion, which of these values are widespread in our society? Which are important to many people? (Presentation of list)*

	A (Personal)	B (Society)
Having good friends, close relationships with other people	85%	49%
Being there for your family, committed to your family	80%	48%
The independence to largely live your own life	71%	45%
Personal responsibility, responsibility for yourself and your actions	70%	19%
Having fun, enjoying life	58%	65%
Being appreciated and recognised by others	57%	45%
Having children	56%	35%
Career success	54%	68%
Living healthily	53%	23%
Living in an environmentally friendly way	53%	25%
Helping people in need	50%	15%
Discipline and order	47%	21%
Campaigning for social justice	44%	15%
Learning new things	43%	15%
Seeing the world, other countries and cultures	42%	49%
High income, material prosperity	40%	76%
Self-realisation	39%	46%
Having big experiences, adventure, excitement	27%	45%
Questioning the meaning of life	24%	7%
Religion, firm spiritual beliefs	20%	13%
Being socially or politically active	20%	13%

A Personal   B Society

Source: Institut für Demoskopie Allensbach; CAPI survey, January 2019 and November 2019.

As we can see, a **trend towards an individualised/ community-oriented set of values**, with a high share of idealistic value notions, is emerging in terms of today's personal life goals. Although community is becoming more important, this is not happening at the expense of the individual. Self-determination and self-realisation remain important. Individuality and community-oriented actions are not regarded as a contradiction in terms per se. Individualism can, amongst other things, be assessed as a contribution towards plurality – and there are social forms by which individual strengths can be contributed to society. The overarching goal is to care for one's own immediate social environment and, as a result, to lead a more conscious and mindful life. Where necessary, values are currently being redefined – at least by a portion of society – and geared towards this new definition in order to achieve harmony between the individual and society.

The outlined canon of values is not, however, shared by everyone to the same extent. Generally speaking, all value groups exhibit a **variety of opinions depending on various socio-economic factors.** Only in the case of the self-determination-related and norm-oriented values are the differences very minor. One differentiating factor repeatedly stands out as a key reason for different evaluations: socio-economic background or the two elements that form the socio-economic background in addition to the respondent's professional background and the respondent's impression of social status: their level of educational attainment and/or their income.[4] Both factors are closely linked and, in terms of the answers provided, often lead to significant deviations from the average response.

Age also often plays a role in terms of such differences in the answers provided. Other factors – such as gender and background (former East/West Germany and, in some cases, with/without a migration background or the size of the home community [rural/urban]) – also lead to individual deviations from the average response, but are not represented to the same extent in all value groups. Another notable finding is that politically interested people or those who have trust in science/regard societal developments as positive overall more often regard individual values and value groups as important.

e.g. those representing the desirability of awareness-related and community-oriented values and, as expected, political values. This does not mean that people with a high status have completely different values to those with a low status or that people of completely different age groups have completely different values. It does, however, indicate that the approval figures for different life goals are different according to social status or age group.

But what about **the values of 'the many', i.e. society as a whole?** A comparison of self-perception with the assessment of societal developments reveals considerable discrepancies (see Figure 1): in a small number of areas, individuals trust society and believe that their personal goals are shared by the majority. In many areas, individuals are mistrustful of society. This is what Allmendinger calls 'anticipated erosion', the phenomenon by which people fear a decline in the values important to them.[5] Although difficulties in the perception and evaluation of collective action have to be taken into account when comparing personal values with the values observed in many other people/ society as a whole, a clear pattern nonetheless emerges: socially oriented and community-oriented values, in particular, tend to be underestimated. In other words, they are important at an individual level, but individuals believe that they are not as important for society as a whole. Self-centred values, such as selfishness, tend to be overestimated in others. From the viewpoint of the individual, society attaches the greatest importance to performance-related/materialistic values, followed by hedonistic values. However, these are then followed directly by social and self-determination-related values, which are of particular importance at a personal level.

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[4] In respect of the answers provided, these factors are closely linked, i.e. the socio-economic factor comprises aspects such as income and education.

[5] cf. Allmendinger, Jutta (2017): *Das Land, in dem wir leben wollen – Wie die Deutschen sich ihre Zukunft vorstellen.* Munich: Pantheon, p. 68.

When it comes to other values that are desirable at a personal level – such as awareness-related and community-oriented values or personal responsibility – individuals regard these values as lagging far behind at societal level. As on the personal level, creative and norm-oriented values occupy a mid-table position, but are nonetheless estimated to be of less importance on a societal level. Traditional values and political engagement bring up the rear, as they do at individual level. In terms of assessing the values widespread in society, a particular socio-economic profile plays a much less important role. Where different evaluations occur, however, they are once again attributable to the respondents' educational level and/or socio-economic status.

People believe that the values prioritised by society do not reflect their personal values. Therefore, the question is: can people live with this perceived discrepancy, and do they want to, or **is it their hope and desire that something changes going forward?** The answer is clear: they want something to change. For the future, people want to build on current (positive) developments and what is currently important to them. They want to see change in the future in areas where they currently identify shortcomings, especially at a societal level. In other words, what they regard as responsible for a decline in values or in areas where they regard their own livelihood as being at risk (at least partially). In other words, the pattern of capitulation/resignation identified by Allmendinger and encountered 'less often' in the legacy study also plays a minor role here.[6]

People want to see a fairer, more solidary and (still) social world in which politics connects with people's needs (see Figure 2) They are therefore seeking 'inclusive modernisation'.[7] According to a large majority of the respondents, increasing the attractiveness of rural life, a conscious and mindful everyday lifestyle and the associated taking of responsibility for one's own actions and their consequences all have a key role to play in ensuring positive societal development. The issue of equalisation between urban and rural development is particularly surprising, given that there is currently not much debate about any disparities. Here, the surveyed cross-section of society is highlighting what may be a topic of underestimated importance – and one that will grow in significance on account of rising rents and property prices in urban conurbations, new mobile working possibilities and the desire for close social ties. We are also witnessing an increase in values that serve to increase stability within society, such as discipline and order. People are giving creative values a chance. It is hoped that they become more important, but not so important that they dictate people's lives completely.
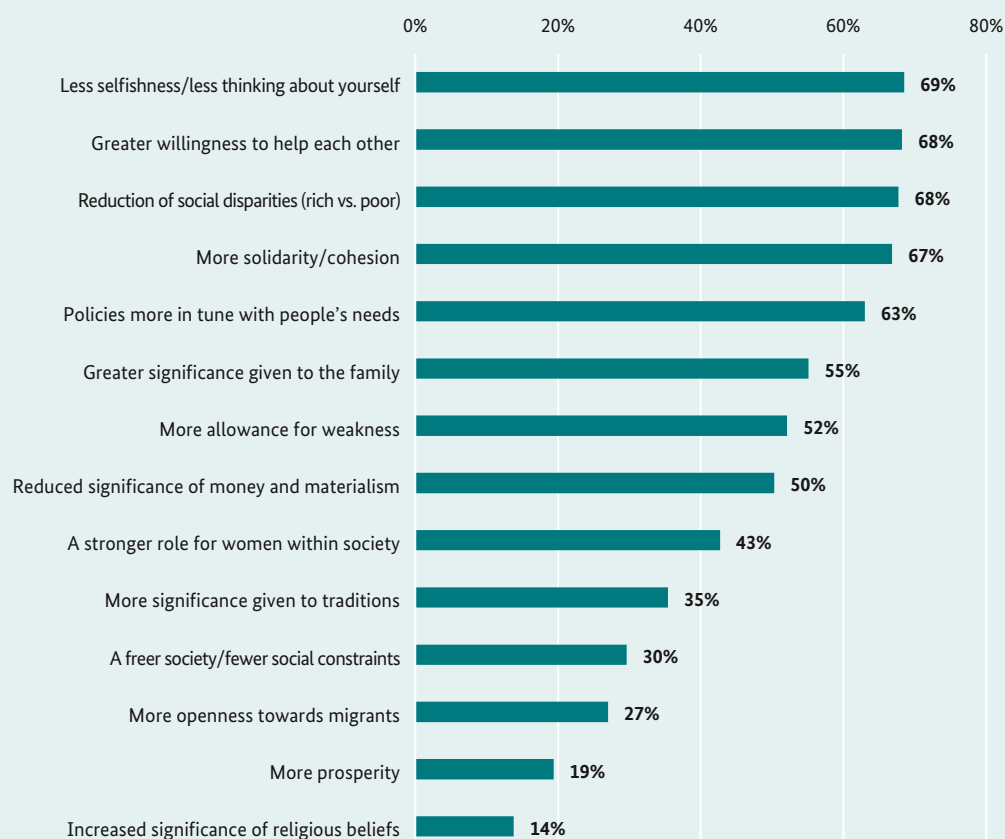

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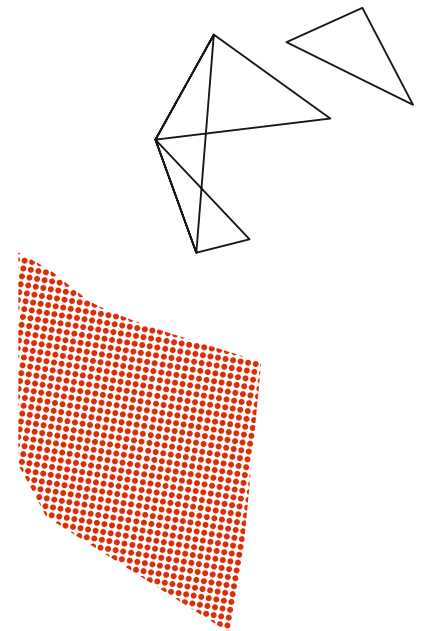
6   cf. Allmendinger, Jutta (2017): *Das Land, in dem wir leben wollen – Wie die Deutschen sich ihre Zukunft vorstellen.* Munich: Pantheon, p. 70 f.

7   cf. Allmendinger, Jutta (2017): *Das Land, in dem wir leben wollen – Wie die Deutschen sich ihre Zukunft vorstellen.* Munich: Pantheon, p. 71.
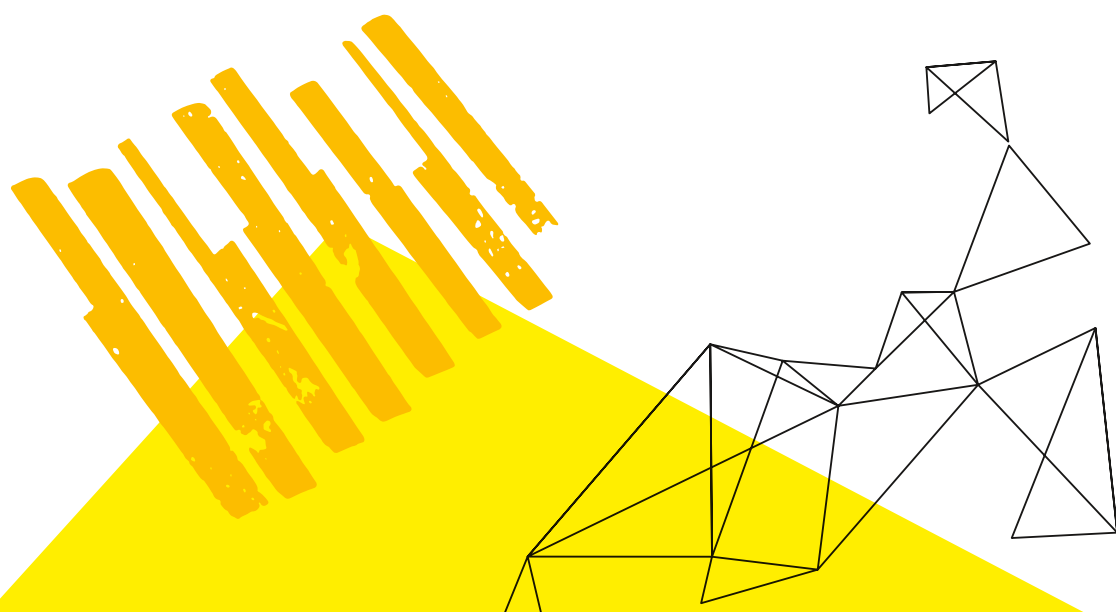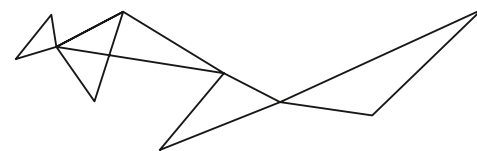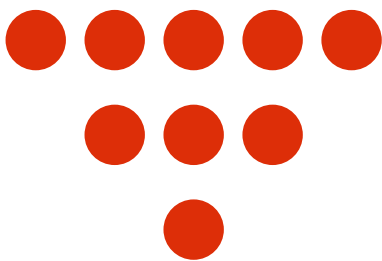
Figure 2: Desires for the future

Basis: Federal Republic of Germany; population aged 16 and over; N=616

Question: *If it were up to you: what should society be like in the future? What would you like to see?*
(Presentation of list)

Less selfishness/less thinking about yourself	69%
Greater willingness to help each other	68%
Reduction of social disparities (rich vs. poor)	68%
More solidarity/cohesion	67%
Policies more in tune with people's needs	63%
Greater significance given to the family	55%
More allowance for weakness	52%
Reduced significance of money and materialism	50%
A stronger role for women within society	43%
More significance given to traditions	35%
A freer society/fewer social constraints	30%
More openness towards migrants	27%
More prosperity	19%
Increased significance of religious beliefs	14%

Source: Institut für Demoskopie Allensbach; CAPI survey, January 2019 and November 2019.

Only a few respondents attach high importance to a freer (or even freer) society and fewer societal constraints in the future. The participants may feel that too much personal responsibility within society stands in competition with the solidarity values. In other words, a freer society could have a rather negative effect and potentially further engender selfishness within society, which is currently regarded as predominant. Issues such as globalisation and migration are also a cause of concern for a section of the population. Only a few respondents see benefits in a society that is open towards migrants and that intervenes in international problems. A majority would prefer that the problems in Germany be solved first. Once again, it becomes clear that respondents' educational level/income and socio-economic status have a decisive influence on their assessments and that their desired future varies accordingly. It is also apparent that the factor 'place of residence' (urban/rural) makes a difference much more often in terms of preferences for the future than in respect of the present day, i.e. respondents' answers differ more often due to the size of their home town/city.

From today's perspective, the participants are relatively pessimistic in the way they envisage the expected future. They fear that solidarity and social values will decline, rather than gain, in importance. That the world in which we live will be highly materialistic and dominated by selfishness. That politics will not succeed in connecting with people and that technology will increasingly control our lives. Only in terms of environmentally friendly behaviour and a greater sense of responsibility do the participants indicate hope; they believe that these aspects will have established themselves in the future.

In summary: the respondents do not believe that their own self-perception is reflected in society. For the future, they hope to see a world that, in their subjective view, is very different from today's reality in many respects and that clearly converges with their personal life goals of today. Ultimately, however, they fear that the changes that they see emerging now – and that they regard as negative – will continue in the future. These findings are also reflected in various parts of the legacy study and the *Values & Visions 2030* study.

The respondents of the *Values & Visions 2030* study, for instance, evaluated the relevance of the values 'solidarity' and 'generosity' as low in the present and future, but indicated that they were highly desirable. The same applies for the values of 'equality' and 'fairness'.[8] When asked about the importance of the sense of togetherness, 81% of respondents in the legacy study agreed that the sense of togetherness is important and 85% said that they would like to propagate it. Only 23%, however, believed that there will be a stronger sense of togetherness in the future.[9] The results show that people's values are often not all that far apart and that they converge particularly strongly when people are asked about their desired world of tomorrow. This is also confirmed by the findings of the legacy study: people's legacies are a lot more similar than their current attitudes.[10] Moreover, people feel that differing values play a subordinate role when it comes to social cohesion.

At the same time, **specific characteristics** emerge from the analyses that can be used to explain differing preferences in terms of values and the evaluation of current and future developments. Reflecting the participants' own assessment of what divides them, the analyses illustrate that these characteristics are chiefly **characteristics of social inequality,** i.e. **social class, education and income**. These characteristics also overlap with the origins of the respondents, i.e. the question of whether or not a respondent is a migrant. Those with a lower status/lower educational level and lower income, for example, tend to be more concerned about current developments and the further drifting apart of social strata. Unlike those who are better off, they are the ones who perceive more negative changes in their personal environment. Social status and education/income are also the most significant characteristics for answer behaviour when it comes to the question of weakening cohesion in Germany.

People would also like to see an increase in the attractiveness of rural regions, although **place of residence (rural/urban)** is not regarded as a divisive factor, at least not for the present. Although place of residence does occasionally play a role in questioning about what is desirable at a personal level, it pales in comparison to other characteristics. The place of residence often

8   Fernow, Hannes et al. (2017): *Values & Visions 2030 – Was uns morgen wichtig ist* and GIM Gesellschaft für Innovative Marktforschung, p. 76.

9   Allmendinger, Jutta (2017): *Das Land, in dem wir leben wollen – Wie die Deutschen sich ihre Zukunft vorstellen.* Munich: Pantheon, p. 205.
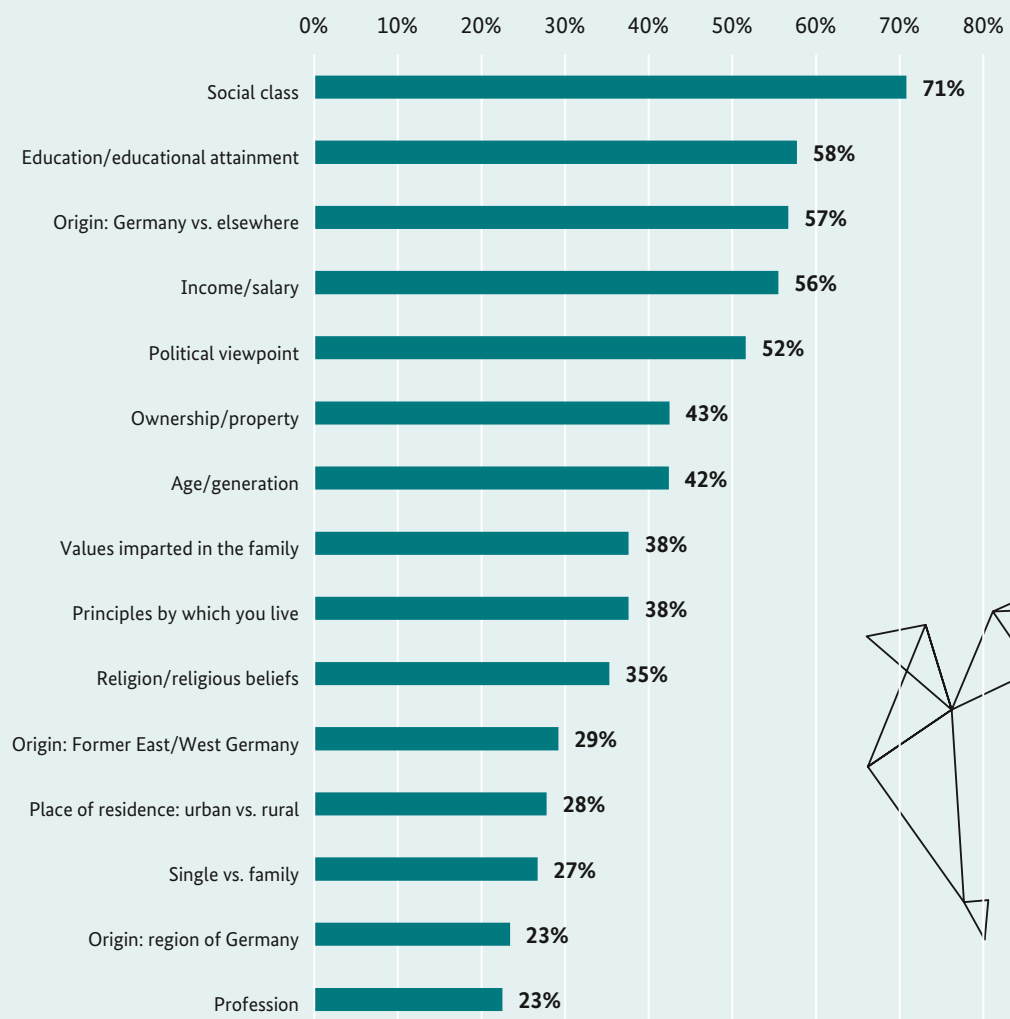
10   Allmendinger, Jutta (2017): *Das Land, in dem wir leben wollen – Wie die Deutschen sich ihre Zukunft vorstellen.* Munich: Pantheon, p. 217.

grows in importance, however, when people are asked
about their hopes and desires for the future. It seems
to be the case that 'city vs. country' is not yet seen as a
(sharp) dividing line in society, but as an indication of
greater potential disparity between cities and the coun-
tryside in future – which is something to be avoided.

Figure 3: What divides and separates people

Basis: Federal Republic of Germany; population aged 16 and over; N=616

Question: What are the dividing lines in Germany? What divides and separates people most in our society?

Social class	**71%**
Education/educational attainment	**58%**
Origin: Germany vs. elsewhere	**57%**
Income/salary	**56%**
Political viewpoint	**52%**
Ownership/property	**43%**
Age/generation	**42%**
Values imparted in the family	**38%**
Principles by which you live	**38%**
Religion/religious beliefs	**35%**
Origin: Former East/West Germany	**29%**
Place of residence: urban vs. rural	**28%**
Single vs. family	**27%**
Origin: region of Germany	**23%**
Profession	**23%**

Source: Institut für Demoskopie Allensbach; CAPI survey, January 2019 and November 2019.

A further characteristic for differences in answer behaviour is political interest – and sometimes linked to this – trust in positive scientific and societal developments. No less than half of respondents stated that the differences in political viewpoints had grown wider and more entrenched, weakening social cohesion, and that people were divided by political opinions. People hope that politics will be able to reconnect with citizens, thus enabling future positive development within society. People do not feel that they are understood or listened to by politicians and/or have not had the practical experience of being able to make a difference through their own engagement. As a consequence, active political engagement is only met with excitement by a small number of respondents; many regard an interest in political information and personal responsibility as desirable and, in the legacy study, advise future generations to become well informed. This not only reveals discrepancies between citizens and their political representatives, but also between politically interested citizens and those who are less so – and also between those with different political viewpoints.

Whilst key differences are also evident in relation to age, it is reasonable to assume that these differences are due to reinterpretations of the meaning of values. This is supported, for example, by the fact that age plays a vital role in terms of the perception of diverging values, but plays a lesser role in respect of social cohesion and the assessment of what divides people. This interpretation is further bolstered by the fact that older respondents more frequently perceive a decline in sense of family. This same finding is reached by the legacy study, which concludes that 'the evolution of society [in respect of family] has not led to relativisation, but rather to a plethora of ways of life against the background of traditional notions.'[11]

Respondents' origin – in the sense of the former East or West Germany – also emerges as a characteristic underpinning different opinions. Here, however, it is reasonable to assume that this is closely linked to factors such as educational level, income and social status.[12] As illustrated by the latest IW Distribution Report, the average income in the former East Germany remains well below that in the former West Germany, and this with income ineuqlity considerably greater in East Germany.[13] Consequently, career success is more often regarded as explicitly desirable for respondents from the former East Germany. By the same token, respondents from the former East Germany are more likely to perceive an increase in social inequality than respondents from the former West Germany, although a declining trend has been witnessed since the peak in 2005.[14]

[11] Wetzel, Jan (2017): *Forschungsbericht III. Ergebnisse der Vermächtnisstudie zum Thema Familie und Partnerschaft*, WZB Berlin Social Science Center (publisher), Berlin, p. 8.

[12] Brühl, Kirsten; Koppel, Johannes; Schomburg, Frank; Schuldt, Christian (2017): *Next Germany – Aufbruch in die neue Wir-Gesellschaft*, Zukunftsinstitut GmbH (publisher), Frankfurt am Main, p. 93 f. and Deutschlandfunk (2007): *Was hält Gesellschaften zusammen?*, available online at: deutschlandfunk.de/was-haelt-gesellschaften-zusammen.1148.de.html?dram:article_id=180079 (accessed on 9.9.2019).

[13] Stockhausen, Maximilian; Calderón, Mariano (2020): IW Distribution Report 2020, German Economic Institute (publisher), Cologne, p. 12 f

[14] Stockhausen, Maximilian; Calderón, Mariano (2020): IW Distribution Report 2020, German Economic Institute (publisher), Cologne, p. 12.

3

SUMMARY OF SCENARIOS: WHAT SOCIETY AND THE VALUES OF TOMORROW MIGHT BE LIKE

3

In light of the fundamental uncertainty surrounding future developments and increasing systemic complexity, it makes sense, in a foresight context, to build on the extrapolation of expectations and future desires by exploring alternative futures for Germany in the 2030s by means of scenarios – and to identify possible changes in value landscapes on the basis of these potential future societies. This allows us to generate as comprehensive a vision of the future as possible – and one that encompasses alternative development paths. The scenario technique is a common foresight method that has been tried and tested in many different contexts.[15] The scenario approach used in this study is exploratory rather than normative. This means that the scenarios describe potential futures but do not express a preference.

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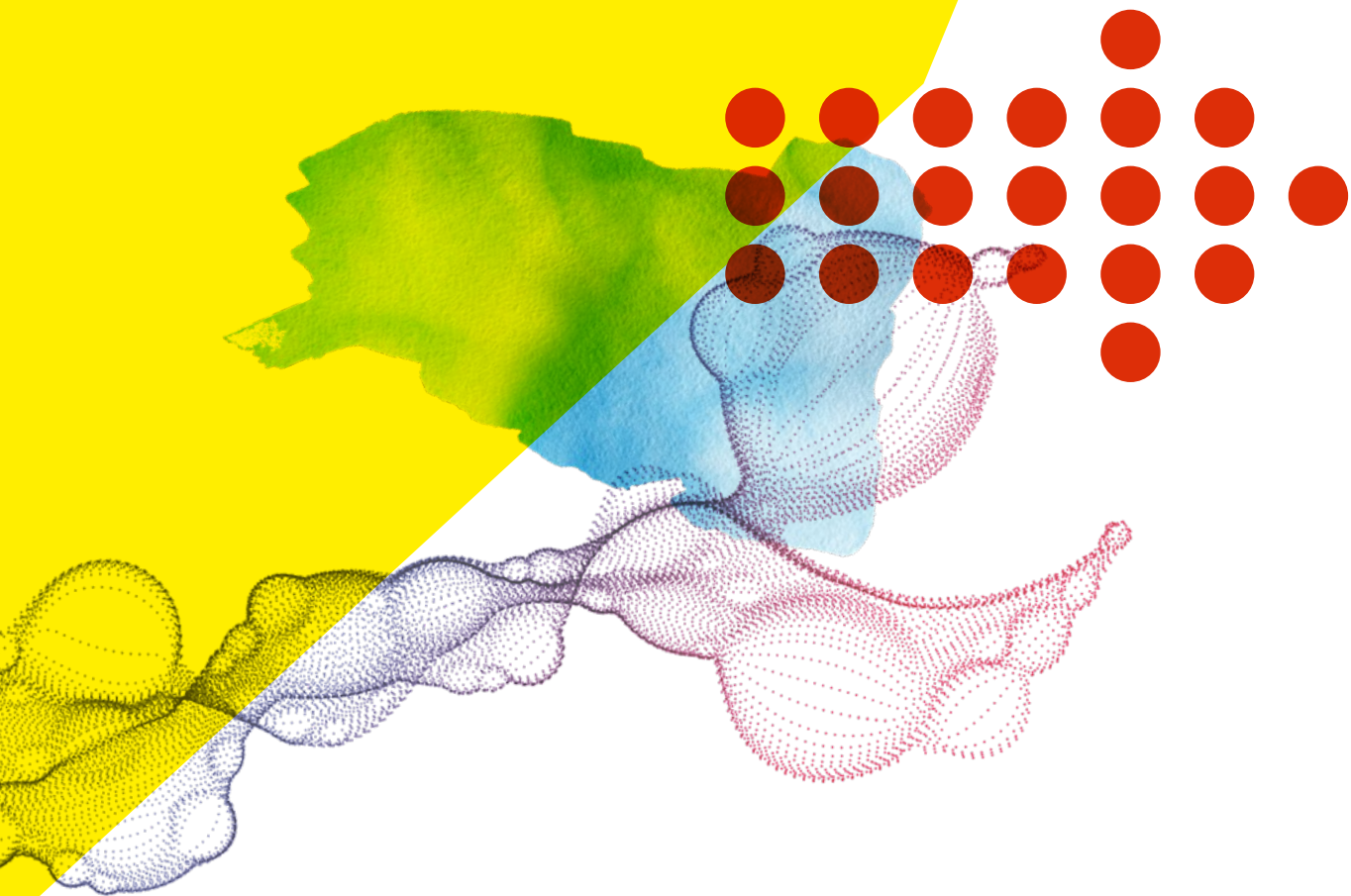
15   One of many: Wilms, Falko (editor, 2006): *Szenariotechnik. Vom Umgang mit der Zukunft*, Berne.

3.1 The 'European route' scenario

You can't talk about Germany in the 2030s without also talking about Europe. Germany is closely involved in a new trend of European integration. Long-discussed strategy papers are now being effectively implemented. The policy known as the 'European route' is seen as the answer to an intensification of global competition in the 2020s that equated to a multilateral race for industrial and strategic autonomy. In accordance with the principle of strengthened cooperation, the EU and, in particular, its leading member states responded with a robust strategy that sought to cement the political capacity for action of the EU and its member states, as well as bolster the global competitiveness of the European economy.

Since the 2020s, a key pillar of this policy has been the creation of powerful European innovation centres in strategically important sectors (quantum technology, artificial intelligence, aerospace, hydrogen, etc.), with these innovation centres set up in direct proximity to European research institutes and leading universities. This often leads to laborious negotiations in Brussels in order to reach a joint position on the allocation of shared responsibilities at European level (e.g. sole responsibility of the EU for aerospace), whether this is achieved via opting-out mechanisms or concessions in other areas.

The implementation of this strategy in the first half of the 2020s coincided with moves by European companies to relocate more production and manufacturing to Europe, as global supply chains proved to be extremely fragile as a consequence of geopolitical crises and pandemics. The 'European route' is characterised by an emphasis on uniquely European principles that lend Europe a special status in terms of how various areas are managed worldwide; examples include high standards in the fields of environmental protection, data protection/use, responsible AI, carbon pricing, an emphasis on the importance of social partnerships (including in terms of automation) and high ethical standards in genetic engineering and biotechnology.

Approval rates for the European Union amongst the German population have been consistently high for years. The frame of reference in everyday life and in the media is now only rarely national; instead, the perspective extends to other European countries. The macroeconomic situation is stable, with moderate growth rates on average. Eurosceptic parties and opinions still persist in Germany and most other EU states, albeit at a low level; they barely make an impact on public debate.

As it has become harder to enact an effective global climate regime due to tough global competition, the issue of the environment remains very high on the political and scientific agenda due to ongoing climate change. In spite of the lack of global willingness to cooperate, successes have been achieved in terms of reducing emissions in Europe.

Alongside environmental issues, social issues play a major role in public debate. Whilst many highly skilled jobs have been created – particularly at the innovation centres – a large service-oriented sector with low skill requirements has also emerged, widening the income gap. Here, politicians are attempting to bring about appropriate wage levels for low-skilled services by means of strengthening social partnerships. To this end, the EU has set up a job training fund, the aim being to facilitate training and development for workers impacted by automation. In the early 2030s, a pre-emptive mechanism was added to this fund, meaning that funding is also accessible for workers who, according to forecasts, may be affected by automation. There is a significant shortage of skilled labour across the European Union. On account of high European standards, firmly established democratic systems and a high quality of life, the Blue Card is highly sought after.
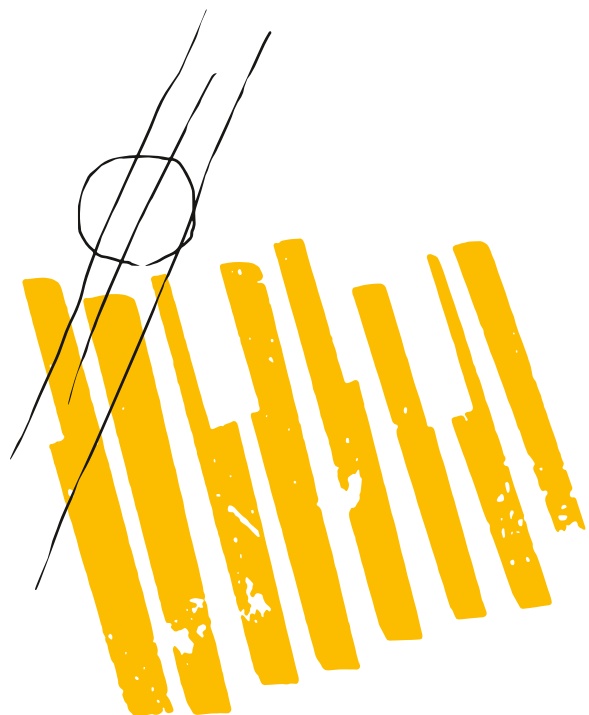
The values landscape in the 2030s

The values landscape in the 'European route' scenario is characterised by the Europeanisation of both individual lives and society as a whole. Complementary European identities have emerged on a broad scale. Europeans see themselves as 'special' and avant garde when it comes to setting ethical and social standards (especially when compared to other regions of the world) and are proud of their uniquely European approach. This interpretation of 'European patriotism' results in a redefinition of traditional values and constitutes a unifying element that brings together different social strata.

The most significant changes in the values landscape of the 'European route' scenario are as follows:

a. **Community-oriented values** have grown in importance due to the Europeanisation aspect, as an identity-building component has been introduced. The feeling and self-attribution of (also) being European is widespread. Community spirit also has a European flavour, but – depending on context – should be seen as an addition to existing affinities. The desire to be part of a strong community is very pronounced amongst most people. The increasing diversity of society, however, repeatedly provokes resentment towards non-EU citizens with cultural value models that do not correspond to those of the majority.

b. In the 'European route' scenario, **performance-related values** remain at a high level given that global competition is intense – and it is important for people to be able to keep pace with this competition.

c. **Awareness-related values** have grown in importance, as environmental/sustainability awareness has been internalised due to the political framework conditions of the EU, from which the values landscape takes its cue. Moreover, sustainability-related technologies are a key sector of the economy.

d. As 'Europe' is also a concept in terms of security policy, **norm-oriented values** are also codified through a European prism. Going beyond the security policy aspect, 'Made in Europe' is a symbol of trust – in a world plagued by mistrust between geographic regions – when it comes to questions surrounding the application of genetic engineering and digital infrastructure/technology.

e. The high approval rating for European integration and a 'broad coalition of European friends' results in declining significance for **politically oriented values**, as the degree of polarisation and politicisation has decreased in the broader population. On the other hand, there are those who chiefly define themselves by their national identity and for whom politically oriented values now hold greater relevance.

3.2 The 'Competition mode' scenario

Germany in the 2030s is characterised by the considerable economic momentum of a largely digitalised economy, which goes hand in hand with rapid transformation processes and a need to adapt for the working population. In this context, the state lays down rules that are based on the guiding principle of fair competition, with a maximum degree of market participation. This principle seeks to create a level playing field for all companies wherever possible. As a support mechanism, the underlying conditions (e.g. the steering effect of the tax system) are designed to foster personal initiative and unimpeded development.

At the same time, personal responsibility has also been strengthened by adding a personal liability principle to the culture of performance. The aim of this measure is to prevent profits from being privatised, but losses being nationalised – as was the case in previous crises. Anyone who takes an entrepreneurial risk will be rewarded with large profits or a high income if they succeed, but will also be personally liable in the event of severe losses (or successful legal challenges).

The starting point for this extensive debureaucratisation, deregulation and dynamism was an attempt to overcome the persistent weakness of the global economy in the early 2020s. Compared to the 2010s, German and European companies have caught up considerably and are now amongst the leading global players. The paradigm of fair competition, with maximum market participation, has made antitrust law a powerful weapon in the fight against oligarchies and monopolies – and thus against restriction of competition.

Economic growth is stable, with considerable investment in research and development. The debt limit is almost fully complied with – and budget surpluses are used to pay off debts and invest in important future infrastructure and in education. The trade unions and social welfare organisations, however, repeatedly complain that not everyone is feeling the benefits of growth and that social inequality is on the rise. Due to high levels of global growth, climate change and environmental problems have become much worse. As a reaction to the increasing frequency of extreme weather events (not just in Europe) and dwindling resources, a large global market has emerged around the circular economy as well as sustainability technologies/solutions to serve the considerable interest of an increasingly aware consumer base.

The German labour market is plagued by a severe skills shortage. In order to mitigate the associated effects of the shortage, automation processes are being driven forward at great speed. The business-friendly climate also attracts many highly driven migrants who wish to achieve their own entrepreneurial visions in a reliable state that is characterised by rule of law and a stable economic framework.

Most people in Germany are driven by performance. They try to keep up with the rapid pace of change. Holistic 'quantified self' approaches are flourishing; healthy lifestyles and conscious diets are widespread. The performance principle is also making inroads into the healthcare system by means of bonus systems, but not everyone can constantly maintain the fast pace of the world of work. Stress-related illnesses have been on the rise for years. Investment in (lifelong) education is also rising. This is also exacerbating inequalities in access to education, as society's high performers tend to proactively pursue their professional development.

The values landscape in the 2030s
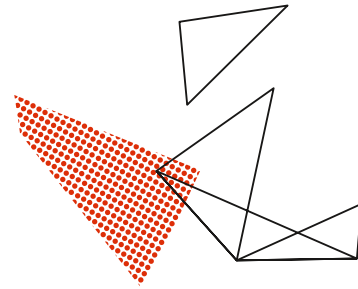
The values landscape also finds itself in 'competition mode', with society dominated by the principle of performance. The paradigm of personal responsibility extends across all segments of society and shapes political, social and economic thinking. It seems almost impossible to escape this paradigm. In terms of the development of the values landscape, there is therefore a social conflict line running along the value divergence between those who have fully signed up to the performance ethos and those who fundamentally reject it and who would like to see a different social model.

The most significant changes in the values landscape of the 'Competition mode' scenario are as follows:

a. **Performance-related values** become much more important, with achievement and status not only reflected in career success and prosperity, but also in a person's health and fitness level. Proof of one's own performance capability can also be provided through the conscious flaunting of hedonistic values; there is considerable overlap here. The extensive performance ethos results in a sharp rise in the disparities between those who can live up to this ethos and those who are simply carried along by the development. The performance ethos acts as a collectivist principle in a society dominated by individualism.

b. This is attributable to a sharp rise in the importance of **self-determination-related values**. Personal responsibility comes to the fore. Any failure or inability to perform is not blamed on external circumstances, but rather on the individual. Personal responsibility also applies in an ethical sense. This means that individuals are responsible for their actions and the consequences thereof. In this scenario, golden handshakes are a thing of the past. Moreover, the goal of self-realisation plays a major role in society.

c. The importance of **creative values** increases considerably, as creativity and innovative strength are central resources of the knowledge economy. Openness towards, and acceptance of, new technologies and their potential applications plays an equally important role, with technologies such as artificial intelligence incorporated ever more closely into creative processes.

d. The importance of **community-oriented values**, as we understand them today, declines in this scenario. Instead, the motto is 'if everyone takes care of themselves, then everyone is taken care of.' Community spirit is usually practised when it ties in with personal goals.

e. **Awareness-oriented values** are monetised and therefore redefined. Health is a key component of the performance principle, as good health is proof of one's own ability to perform. Climate and environmental protection, on the other hand, are considered in terms of market categories and business models (e.g. emissions trading) and, for most people, do not constitute an intrinsic value.

3.3 The 'Return of the blocs' scenario

The isolationist tendencies of a former export nation: Germany in the 2030s is shaped by social erosion and a challenging geopolitical environment. Just as the isolationist tendencies in terms of economics and trade policy witnessed towards the end of the 2010s were the first signs of new international conflict lines, it is possible to talk of the 'emergence of new blocs' in the mid 2030s. Nationalism, protectionism and failed attempts at reform are making multilateral institutions increasingly irrelevant. International cooperation only exists on the basis of shared world views or geographic proximity. Even within the EU, there are divergent tendencies amongst some peripheral European nations.

Due to the collapse of global value chains and the widespread fragmentation of global communication networks ('splinternets'), the global economy is stagnant. In light of increasing uncertainty, Germany is cooperating closely with reliable European partner nations in the area of security, meaning that increased integration is being witnessed in this sphere.

Severe income inequality is contributing to the erosion of social structures. Germany has become an 'hourglass society' without any real middle class – and is characterised by a lack of equal opportunities, societal fragmentation, the strengthening of populist forces and a weak political system. The prevailing parallel worlds are split by social dividing lines that run along ideologically charged issues such as migration, family models and diversity. Climate change is the only conflict factor that has become less entrenched. The consequences of an ageing population were not fully anticipated at the start of the 2020s; the skills shortage in sectors relevant for the future is having a lasting adverse impact on the economy – and is exacerbated by a failed migration policy. The increasingly politically driven technologisation and decentralisation of production, which began in the late 2020s, is now starting to have an effect. In people's private lives, the use of technology is rather modest, partly due to socio-economic constraints.

The necessary investments have not been made in key areas of public infrastructure. Instead, the government is pressing ahead with huge investments in (digital) defence, robotics, artificial intelligence and biotechnology in a military context. The fear of 'cybergeddon'[16], with system failures across the board, is omnipresent. Therefore, foreign policy is focused on arming for cyber warfare. This trend, combined with dwindling social cohesion, results in a significant decline in perceived (but also real) security and stability.

The population is exposed to an explosive mix of external threats and economic volatility. As people are increasingly retreating into their private environments, families and neighbourhoods are becoming more close-knit. Whereas foreign policy is guided by a relatively clear set of rules, which define the core political interest, there is virtually no progress in terms of significantly improving people's lives at home. A yearning for greater social cohesion and progress hangs in the air. This is not only evident at national level, but is also reflected in civil society initiatives that seek to promote cooperation between different 'blocs'.

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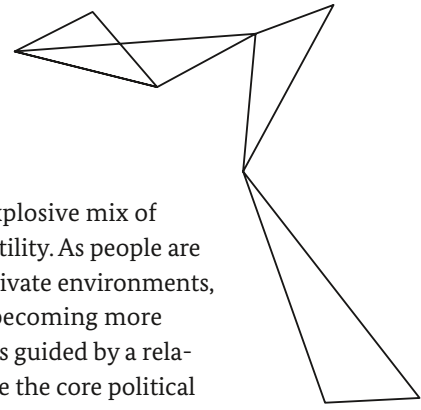
[16] Violent upheaval based on the blanket sabotage of computer networks, systems and activities. Such an incident may include elements of digital warfare, cybercrime/cyberterrorism and hacking and leads to the far-reaching disintegration of Web-based systems and, as a result, related economic systems. Wikipedia (2019); Cambridge Centre for Risk Studies (2019) and the World Economic Forum (2014).

The values landscape in the 2030s

The make-up of values in 2030s Germany reflects the country's increasingly insular focus: the strong liberal and individualistic tendencies, witnessed since the start of the 21st century, have more or less completely diminished, with the need for a coherent and prosperous society as the overriding concern. Foreign policy threats, as well as domestic and economic volatility, are met with demands for solidarity, conformity and isolationism. The division within society produces a de facto 'democracy of the wealthy' (timocracy) in which the lower classes barely have the economic and temporal resources to play an active part in society.

The most significant changes in the values landscape of the 'Return of the blocs' scenario are as follows:

a. The almost complete disappearance of the middle class and the resulting binary division of society serve to make **community-oriented values** far more relevant. As personal ties are found solely within people's own blocs and, even then, only within their immediate environment, many hold a strong desire for more solidarity and cohesion at the level of society as a whole. Issues such as diversity and migration, however, are usually met with rejection. Along social fault lines, however, minorities emerge that are more closely attached to the ideals of other blocs (e.g. autocratic capitalism).

b. **Awareness-driven values**, such as environmental and health awareness, are pretty much beyond the economic resources of many people and are therefore only relevant for the wealthy elite. On the one hand, they are the theatre of societal conflicts and, on the other, are instrumentalised to put distance between other blocs (e.g. involvement in climate protection). In line with the same principle, **traditional values** have been making a comeback since the 2010s.

c. **Politically oriented values** are influenced by the worsened availability of information caused by the 'splinternet'. On the one hand, the external threat situation results in a politicisation of society, driven by fear of the competing systems of other blocs. On the other hand, a homogenisation of political attitudes is being witnessed, with 'security' as the watchword of politics and society. As a result, we see an amalgamation of norm-oriented and politically oriented values.

d. Uncertainty and mistrust of technologies, and uncertainty/mistrust due to geopolitical and societal threats, create a new need for **norm-oriented values**. The importance of individual freedom and self-determination, as seen in the 2010s, is swapped for security and stability, especially in the sense of economic stability.

e. The expression of **self-determination-related and creative values** is, within the constraints of the bloc, only an option for the upper class (e.g. due to contacts or financial resources). For most people, the possibility of a self-determined life is limited by their socio-economic situation and by the ageing population. Moreover, the fear of manipulative and 'surreptitious outside influence' on one's lifestyle is part and parcel of everyday life.

KEINE
SCHWIERIGEN
ENTSCHEIDUNGEN
MEHR

NO MORE

3.4 The 'Multi-speed society' scenario

'The return of the noughties' – this is the headline used by a British weekly for its analysis of Germany in the 2030s. According to the analysis, Germany is living off its capital and its golden decade following the financial crisis of 2008. The image of Germany abroad is dominated by overdue reforms, difficult coalitions and increasing polarisation. This state of affairs is chiefly attributed to the hyperbolic discounting[17] of politicians in the 2020s. Overall, Germany gradually became less competitive compared to other economies – especially compared to nations who built on their digital infrastructure and technological expertise with a clear vision and on a broad scale. Some companies and innovation clusters – especially those in the big cities –

remain in a strong position, are highly innovative and can hold their own in the global marketplace. But gaps are emerging between them and rural regions, where SMEs constitute the backbone of the economy. Due to a lack of investment, these regions are becoming less competitive. With increasing urgency, industry associations regularly urge politicians to undertake greater investment and reform. In large swathes of rural Germany and in those cities that are not creative or growth hubs, structural weaknesses have taken hold. This results in a two-tier economic situation in Germany. On the one hand, there are the economically strong metropolitan regions in which investment centres and multinational companies are based;

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[17]   Hyperbolic discounting is the psychological phenomenon by which short-term benefits are favoured, even if they are disproportionately smaller than the expected long-term benefits.

on account of network effects, more and more economic strength is being concentrated here, with academic research funded by private enterprise.

The sense of social division is also becoming more acute: not only in terms of an urban–rural divide, but also as a result of increasing automation and streamlining. As a consequence, many people feel that they are facing a never-ending crisis due to rising unemployment figures. The solid growth, which is partly driven by productivity gains associated with greater efficiency and automation, doesn't really benefit a significant portion of the population – or the public finances. Growth is mainly generated by a new middle class of highly qualified knowledge workers in globally well connected innovation centres, where a correspondingly broad low-wage service sector has also sprung up. Nowhere is social division more apparent than in the country's creative innovation centres. There is a dearth of genuine visions – such as great narratives of progress, long-term political goals or new European road maps – to combat the challenges and crises that have been caused by the division between flourishing hubs and economically disadvantaged regions with a weak infrastructure. The EU is divided on central issues such as migration, climate protection and foreign policy.

Digital transformation is encompassing more and more areas of life. The technological scepticism that has long been attributed to the Germans is no longer widespread. Most people find that the use of technology makes their life easier – especially as it offers a potential refuge – and are prepared to rapidly incorporate technological innovations into their daily lives, provided that the benefits are clearly apparent. People are actively shaping their digital image in a digitally transformed everyday world/business arena. The background noise is loud in the emerging Internet of things. People are keen to communicate and connect with each other. The flip side is illustrated by the difficulty in distinguishing genuine social media content from deepfakes. This is a common way of making correlations seem like causalities. 2030s Germany is in a fragile state in which a failure to tackle structural challenges could lead towards a qualitative social tipping point – if social cohesion cannot be strengthened and if innovative strength and passion cannot be put on a broad footing beyond the 'islands of growth'.
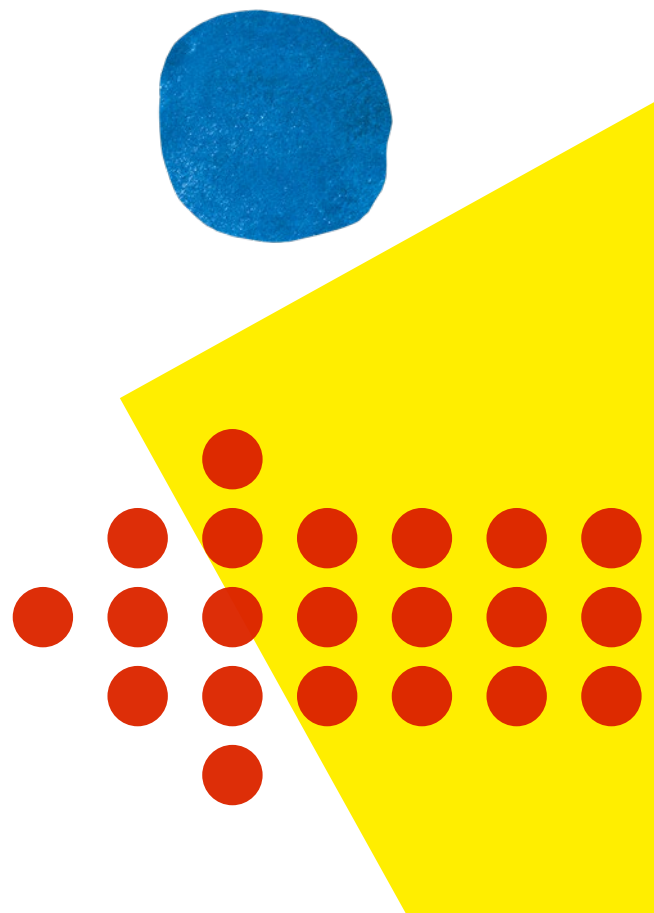
The values landscape in the 2030s

Compared to the year 2020, the values landscape in the multi-speed society of the 2030s is characterised by incremental shifts in the existing values framework. These shifts reflect social conflicts – e.g. the solidification of social inequality, marked regional disparities and urban/rural imbalances – and the overall fragility of social cohesion.

The most significant changes in the values landscape of the 'Multi-speed society' scenario are as follows:

a. In light of a perceived sense of overload of complex day-to-day issues, **self-determination-related values,** such as self-organisation and individual freedom, are becoming less important. Digital assistants are becoming popular across the board, as people see them as a way of lightening the load. Many people, however, still have the illusion of leading a self-determined life.

b. In terms of **community-oriented values**, it is clear that solidarity is continuing to decline within society as a whole. Solidarity is, however, increasing within smaller communities, which is also strengthening polarisation tendencies and divisions with other groups.

c. When it comes to **awareness-oriented values**, there is still a high disparity between values and personal actions in the areas of sustainability and environmental awareness. This gives rise to hybrid behaviours that regard environmental protection as important, but that also value air travel as a way of experiencing the world and travelling for business. People's health awareness is often shaped by social and economic pressures, e.g. peers who appeal to the responsibility of society/the individual and thus exert pressure.

d. **Traditional values** are undergoing a revival and recoding. Many people hope that the values' parameters will guide them through everyday life and reassure them in light of the high perceived complexity of their situation. This revival is, however, often subject to different interpretations, with questions of identity becoming increasingly significant.

e. **Performance-related values** are becoming less important in some places, partly due to the disappointments arising from the deep-rooted social inequality. Material prosperity is increasingly not something that is earned (or can be earned); it is 'inherited'. On the one hand, there are those who are born into the 'right' family; on the other, there are those who are left behind and marginalised. Non-materialistic values are once again growing in importance in relation to materialistic values, as the perceived achievement here is the result of one's own efforts.
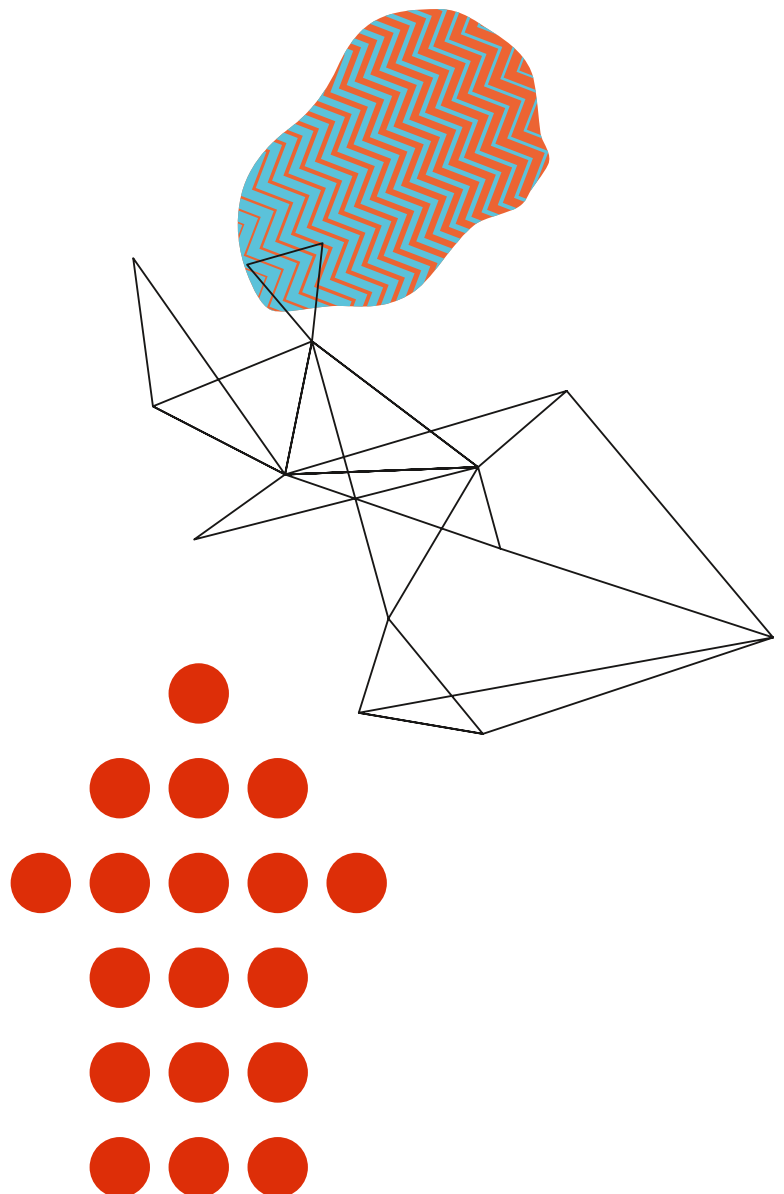
3.5 The 'Bonus system' scenario

In 2030s Germany, a digital points-based system, the tenets of which were negotiated on a participatory basis, is launched, offering incentives for changes in behaviour. With the rise of China, points-based systems – as instruments of political control – became the subject of heated debate worldwide, attracting a mix of admiration and hostility. Liberal, democratic nations also discussed whether to adopt such a system and, if so, what form it should take. The debates extended well beyond the management of individual policy areas (e.g. Canadian immigration policy) by means of points-based systems. Instead, the discussion was about overall political control using points-based systems. Following protracted and extremely heated debates in Germany, politicians have opted for a central digital points-based system that observes democratic principles, works on the basis of bonus incentives, involves citizens – and re-

lies on voluntary participation. The principle of voluntary participation was at the heart of the debate leading up to the system's introduction. Opponents repeatedly argue that a voluntary system creates social pressure to participate (e.g. via social media and its prevailing culture of comparison) and is therefore a fantasy. Just like non-voters, those who voluntarily waive their right to opt in will – in a points-based system – be forced to live with the decisions of the majority. Therefore, the principle of voluntary participation is often dismissed as 'window dressing' by opponents, who argue that it is not possible to live completely outside the system.

The increase in popularity for the points-based system in Germany was partly driven by the progression of climate change. This resulted in pressure to take corrective measures, with a points-based system proving to be an efficient control mechanism in terms of dealing with the implications of climate change (e.g. points-based evaluation of carbon footprints). The 'polluter pays principle' has been rendered transparent by the points-based system. In light of the strong economic situation, the points-based system has also shown itself to be a suitable instrument for the labour market, which is plagued by a skills and labour shortage. Thanks to the points-based system, potential qualification capacities can be tracked and the geographic mobility of workers efficiently organised.

The precise implementation of the points-based system was initially highly controversial. In particular, negotiations on the rules of the digital points-based system – spanning the tensions between societal acceptance, the specific role of the state and the monetisation of data by private companies – were a source of conflict in Germany and resulted in the development of a points-based system whose rules were drawn up on a participatory basis. The points-based system is met with approval by a majority of the population in 2030s Germany, as many people feel that it offers a binding guidance function for different social groups within a more complex and nuanced society. At the same time, new norms are gradually being anchored within everyday life in 2030s Germany on account of the system's function as a forecasting and control instrument.

On the other hand, new conflicts are emerging: those who are permanently left behind find it ever harder to increase their scores. The points-based system per se is only challenged by a minority who do not feel represented within it. As a result, fierce and emotional debates are frequently held about the detailed structure and calibration of the system, with proposals put to the vote by means of direct democracy and also argued before the courts.

The values landscape in the 2030s

The values landscape of the 'Bonus system' scenario is dominated by a digital nervous system and the implementation of a voluntary digital points-based system. Within this system, it is no longer possible to clearly distinguish between political objectives and personal value sets. The digital nervous system has generated extensive transparency, which in turn has closed the gap between values and behaviour: individuals can be clearly identified in both the real and virtual worlds. On the one hand, this leads to widespread harmonisation of the values set amongst active participants in the points-based system; on the other hand, it results in a widening values disparity between advocates and opponents of the digital points-based system.

The most significant changes in the values landscape of the 'Bonus system' scenario are as follows:

a. On the surface, **community-oriented values** appear to grow in importance, but in actual fact are propped up by points-based incentives (which do not represent an indicator of a general strengthening in community-oriented values). Overall, there is a high latent potential for conflict, which is also fuelled by population growth. Society is dominated by a competitive mindset; community values are only practised when individuals see a potential benefit in doing so. With the points-based system, politicians and officials are creating incentives for community-oriented behaviours (e.g. in terms of intergenerational fairness and the integration of climate migrants), the central aim being to ease the burden on social security systems.

b. Following the same logic, a change is also evident in respect of **awareness-oriented values**. The state adopts a central control function in the areas of environmental protection and health, lending these a high degree of importance. The discrepancy between values and personal behaviour is increasingly dissipating.

c. **Performance-related values** are becoming much more important, with the meaning of performance/status widened; a personal points tally is an expression of achievement, success and standard of living. In the long term, conformity with certain behaviours and values leads to bonuses, which in turn make it easier to reach certain levels of material achievement (e.g. property ownership). This results in a renewed appreciation of social activities (e.g. voluntary work or caring for a relative), which are promoted by means of incentive systems.

d. In terms of **self-determination-related values**, there is a shift in the meaning of self-determination; amongst points-based system participants, in particular, this is increasingly equated with security (norm-oriented values). As such, individualism and personal freedom by the standards of the 2010s are redefined and, in some cases, abandoned in the points-based system. This also highlights the contrast to individuals who do not engage with the points-based system: as a counterpoint, they emphasise self-determination beyond the dependencies of the points-based system.

e. **Politically oriented values** undergo differentiation and grow in importance. In particular, negotiations on the structure of liquid digital democracy and the role of private enterprise within the system harbour considerable potential for conflict and polarise the population.

3.6 The 'Ecological regionalisation' scenario

Compared to the 2010s, 2030s Germany has changed beyond all recognition. The country has undergone a radical transformation based on a new social/ecological alignment of the market economy. Large sections of the population are guided by the new central indicators of sustainability, quality of life, free time and social cohesion. When measured against traditional benchmarks such as GDP, the German economy has declined considerably, but this is not seen as a problem (any more) by the majority of the population. This is because there has been a sea change in terms of how society perceives prosperity. Purchasing power and material wealth have decreased. Moreover, economists are increasingly seeing growth in terms of qualitative growth that is geared towards sustainability objectives. Yesterday's status symbol may now be seen as anachro-

nistic. This huge societal change was not without its difficulties, as there were people who lost out on account of the transformation and the major structural upheavals in many sectors. The transformation itself was a response to an intensification of the consequences of climate change, which led to a proliferation of extreme weather events – i.e. heatwaves, regional droughts, flooding, severe storms and local water shortages – across Germany and Europe. In the face of these dramatic events and – as perceived by broad swathes of the population – an inability on the part of national and European political representatives to take steps to tackle intensified climate change, local grassroots movements started to spring up, some of which emerged from existing networks involving the founder members of Fridays for Future.

The demands of the movement were also the subject of heated discussion amongst German industry associations. Whilst many business representatives rejected such far-reaching proposals as 'dangerous ecopopulism' and considered moving jobs and production abroad (and, in some cases, did so), other business leaders underlined their commitment to their home locations and declared their willingness – given that the consequences of climate change could no longer be ignored – to gear production processes to the ethos of sustainability and also to pay higher taxes for climate protection.

In line with a decentralised approach, climate protection levies were introduced either as part of a rise in trade tax or in the form of a new local consumption/excise tax within the scope of the limited taxation rights of local authorities pursuant to Art. 106 (6ZZZ) of the Basic Law for the Federal Republic of Germany. Basic utilities also vary from local authority to local authority, meaning that regional disparities continue to be observed in Germany. At the same time, neighbourhood networks are establishing social infrastructures on a 'bottom up' basis, complementing public services. 'The German transformation' also divides opinion at European level. Whereas some EU partners are sceptical about developments in Germany, the EU Commission has welcomed them as a key contribution towards achieving the goals of the European Green Deal, e.g. climate neutrality by 2050 and the establishment of a circular economy.

The transformation of society has given rise to surprising changes of perspective: on account of the increased importance of free time, automation has lost its reputation as a 'job killer' amongst many workforces. When it comes to taxing labour, there are some local authorities for whom it doesn't matter whether the work is performed by humans or machines – and who, although it is sometimes controversial, levy a data/machine tax in the form of a local excise and consumption duty. Moreover, some companies – many of which are structured as cooperatives – use the potential associated with automation to divide the remaining workload amongst the workforce. As such, working hours can be reduced for all. As this is not equally feasible in all industries, new social disparities emerge. Wherever regular working hours are reduced, people have more time for training/development and self-realisation.

Community activities and straightforward services, on the other hand, enjoy a new-found appreciation connected with their pivotal role in a functioning society. As the prevailing zeitgeist of the 2030s demands personal initiative in the sense of civic engagement, there is a rise in the 'perceived' social pressure on people to perform such activities in their free time. The yearning for greater freedom, space to be creative and closeness to nature has also resulted in many people moving from large cities to smaller towns and rural areas, thus giving such locations a new lease of life.

The values landscape in the 2030s

The upheaval witnessed in 2030s Germany is not only making it a society in which social participation and economic equality have risen, but also in which the term 'prosperity' is being redefined. Non-economic forms of prosperity are taking centre stage: quality of life, sustainability, free time and social cohesion.

However, the new creative freedoms also go hand in hand with new fears and conflicts. As part of the critical examination of the previous economic and social system, 'difference' and 'civilised disagreement' emerge within society as values that made the grassroots movements possible in the first place.

The most significant changes in the values landscape of the 'Ecological regionalisation' scenario are as follows:

a. **Performance-related values** are being reinterpreted: work and achievements are increasingly community-oriented and meaningful – and less tied to material success and standard of living. The resulting conflict line runs along the representational logic of (desired) status. In this society, inequality is defined and cemented less by aspects such as income and wealth, but rather by aspects of 'cultural, social and symbolic capital'. Symbolic capital – in the guise of recognition and prestige – is accumulated in the form of services and contributions on behalf of the local community.

b. The relevance of **awareness-related values** has risen considerably, with purposeful use of time more important. People ask themselves more questions (about the deeper meaning of life): what comes after material consumerism? How can I make good use of my time? The repudiation of material consumerism and the shift in preferences are bolstered by awareness-related values: respect for Mother Nature and the planet's limits – as well as related topics such as climate-friendly action, 'ethical nutrition' and 'green digitalisation' – have taken hold amongst the wider population. Hedonistic values are influenced by reductionist lifestyles and are redefined as 'pleasure in moderation', 'self-sufficiency' and 'self-restriction based on reason'. People no *(longer)* work in order to merely buy *(more)* things with *(more)* money in a self-determined way, but rather to enjoy pleasure in moderation and meaning in a self-determined way.

c. **Social and community-oriented values** are cemented within local communities, which emerge in rural areas and small towns. Within large cities, this tends to take place in specific areas, as these constitute manageable units. The reach of community-oriented values, such as solidarity, is dependent to a large extent on the geographic environment (e.g. neighbourhood or district). When practising social values such as partnerships and friendships, individuals must – depending on the context and the person with whom they are interacting – assume various roles whilst embodying their own values. The geographically limited communities, however, are conducive to self-affirmation tendencies and a homogenisation of the local values landscape. As a consequence, self-determination is sometimes subordinated, as there is a dutiful and practised responsibility towards the local community: it is expected that one contributes one's skills and abilities as far as possible and follows the logic of the grassroots movements.

d. New interrelations emerge between **performance-related, community-oriented and creative values**: performance-related values are evaluated in terms of their benefit to society. People's own activities are channelled at the level of the local community rather than society as a whole. Evaluation of one's own status and achievement is performed chiefly within the small frame of reference of the local community – and not at the level of society as a whole.

e. As part of the societal debate and burgeoning grassroots movements, which demand a high degree of receptiveness and open-mindedness, **creative values** become more relevant: a willingness to embrace new ideas, open-mindedness, creativity and curiosity are fundamental prerequisites for becoming a recognised member of this 2030s society.
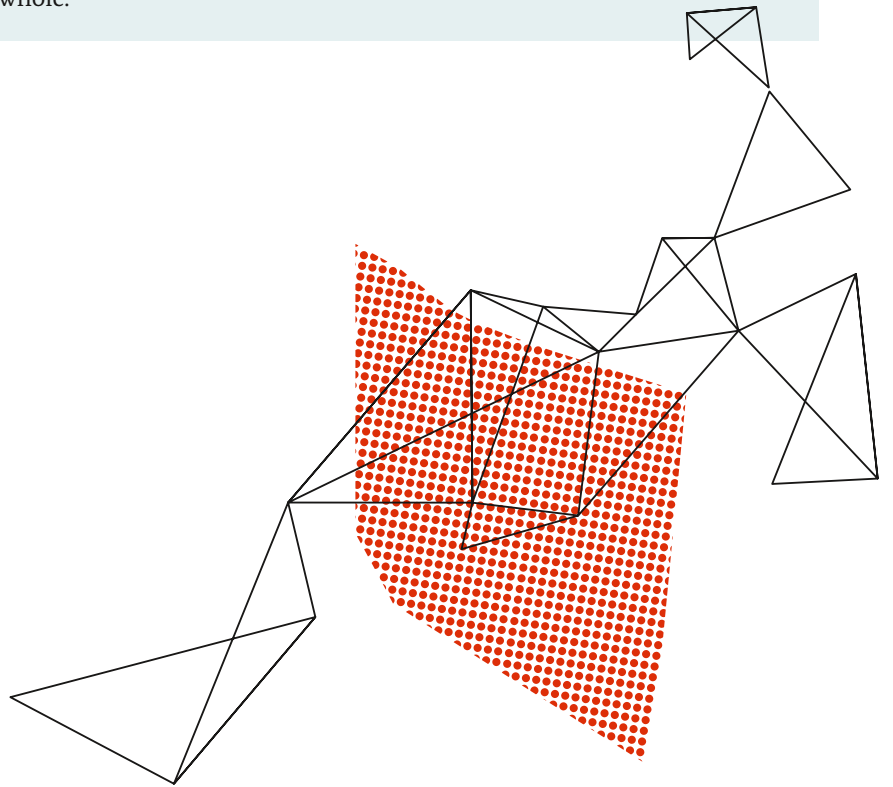
Methodological summary

This study is based on a broad repertoire of methods that ensures an analysis that corresponds to the status quo of values research. Basing the analysis on a variety of qualitative and quantitative methods makes it possible to reflect on this complex subject from a range of different angles. The starting point of the study is extensive literature and data analysis in the form of systematic collation of the findings of the current values debate. Using established values theory, 28 values[18] were identified on the basis of the literature; these were then split into ten thematic value groups[19]. Interviews were conducted with 22 experts from a host of disciplines. On the one hand, the aim was to reflect on the results from the literature and data analysis. On the other, information on the key factors underpinning the scenarios was collected and discussed. The CAPI survey served to generate a separate data set about Germans' current and future values, as well as key factors and instances of value formation/communication. The survey findings from January 2019 and November 2019 were used, with 1,249 and 1,298 respondents respectively. The analysis of unstructured data made it possible to document the reciprocal effects between time spent online and values[20] in Germany for the first time. The ARD/ZDF long-term study on mass communication was used as the data source. The result is a representation in table form of time spent online in relation to the values systems used in this study (see the full version of the study).

As part of the analysis of future values evolution, the exploratory scenario process asks 'What if ...?' The aim of the scenarios was to outline potential fundamental characteristics of Germany in the 2030s, thus facilitating a discussion of the future of the values landscape and value communication. The process from the questions to the final scenarios is split into six stages: exploration of the influencing factors, selection of the key factors, analysis of the development paths, selection of the raw scenarios, development of the scenarios, and synthesis of the values landscape with the instances of value communication in the 2030s. These steps were performed with both theoretical models and practical methods, such as interviews with experts.

In order to specifically incorporate the perspective of young people's values, a focus group was then held with young people. The aim was to gain the current viewpoints of people who have a shared interpretive framework in respect of current events and who currently find themselves at a stage of life in which the importance of career-related socialisation instances and other peer groups are growing in importance compared to primary socialisation instances.

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[18] The 28 values compiled in this manner do not claim to be exhaustive, but merely represent the findings and content of the studies and data sets.

[19] A value group is a group of values that exhibit links in terms of meaning and, on this basis, could reasonably be grouped together.

[20] A value is a relatively stable individual disposition that expresses what a person regards as important in life and which long-term life goals are therefore seen as desirable.

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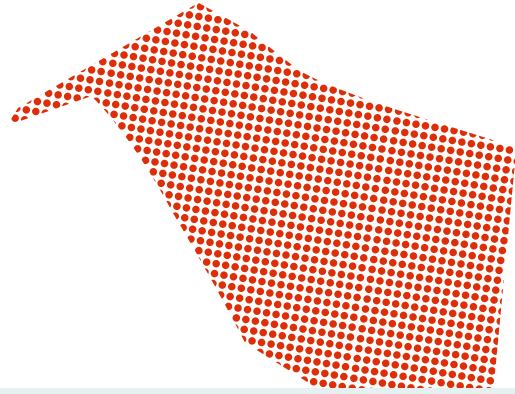
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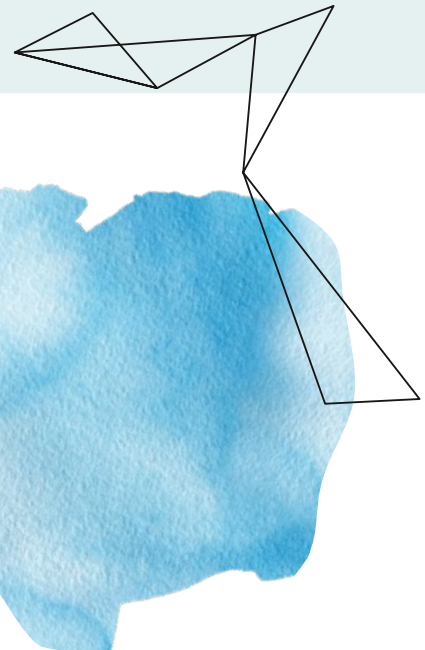
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