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with Accenture



Global Economic Futures: Productivity in 2030

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Foreword



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The global economic backdrop is one of weak growth, complex geoeconomics and deepening policy uncertainty. The question is no longer whether the economic landscape is going to evolve, but how decision-makers can respond to these shifts. Can they harness this wave of change to build more innovative, inclusive, sustainable and resilient economies and businesses?

To help decision-makers understand and anticipate change, the World Economic Forum and Accenture are launching this new series of publications entitled *Global Economic Futures*. The series uses scenario analysis as a tool to understand future trends, vulnerabilities and opportunities, and to identify strategies that can shape better outcomes.

This first edition of the series explores the future of productivity, a critical topic at the root of challenges

around boosting economic growth and living standards. The paper sets out four scenarios exploring the interaction of two core drivers of productivity: technology and human capital. It also presents a data-driven assessment of how businesses in different sectors may be affected.

The aim is not to predict where the world will be in 2030. Instead, the series encourages leaders to think critically, creatively and purposefully about the future and to drive action on the key issues. The paper offers a set of actionable strategies to help businesses and governments not only adapt to change, but also shape it.

We hope this paper and series will be a useful resource for decision-makers as they navigate an increasingly complex global landscape.

Executive summary

The future of productivity – central to economic growth and living standards – will be shaped by technology, human capital and adaptive business models.

Productivity has historically been a critical driver of global growth, increasing living standards and economic dynamism. However, productivity growth has come to a virtual standstill in recent decades, and more than half of the deceleration of global growth since 2008 can be attributed to this slowdown.

Key trends shaping future productivity

There is little consensus on the pace of productivity growth in the coming years, but many trends will influence it, including technology, skills, labour markets, demographics, finance, regulation, infrastructure and geoeconomics.

For example, the commercialization of disruptive technologies has the potential to transform productivity, although the rate of adoption and level of impact remain uncertain. In the case of artificial intelligence (AI), business executives in high-income economies rate the productivity-boosting use of the technology nearly 40% higher than their peers in low-income economies. Sectorally, they expect AI to be harnessed the most in information and technology services, financial services and energy technology in the coming years.

Human capital development will also be critical to reversing the productivity slowdown, not least because of its important role in unlocking technological gains. Nearly half of global business executives cite a lack of workforce skills and visionary leadership as the primary obstacles to AI adoption.

Four scenarios for productivity in 2030

Scenario analysis offers a structured process for exploring, understanding and navigating

uncertainty. The purpose of this analysis is not to predict where the world will be in 2030, but to encourage decision-makers to think critically, creatively and purposefully about the future.

Looking at the interaction of potential acceleration and slowdown on two key productivity drivers – technology and human capital – results in the following four futures:

- 1 Productivity Leap:** A virtuous circle between widespread disruptive innovation and rapid human capital development leads to significant and broad-based productivity gains and a marked improvement in living standards.
- 2 Automation Overload:** Technological advancements outpace human capital development, leading to a "winner-takes-all" dynamic and an economy characterized by increased concentration of wealth and power. Productivity gaps widen between leading and lagging firms, sectors and regions.
- 3 Human Advantage:** Human capital development outpaces technological advancement, centring economic activity on people. Productivity growth is slow and uneven, driven more by creative use of existing technologies than breakthroughs. Productivity gains hinge on the ability to attract talent that can maximize the potential of technology.
- 4 Productivity Drought:** A simultaneous slowdown in technological innovation and human capital development stalls productivity growth. Economies struggle to sustain previous levels of prosperity, leading to stagnation in living standards and socioeconomic progress.

Industry exposure and implications

Each of these futures has the potential to reshape sectors and disrupt individual businesses. Across 12 sectors, four broad clusters are identified based on analysis of the differing headwinds and tailwinds for corporate output and profitability across the scenarios. Five sectors are analysed closely, each characterized by varying levels of exposure to technological and human capital trends: information technology and digital communications; financial, professional, and real estate services; manufacturing; energy and materials; and education.

Strategies for the future

The paper offers a series of high-level strategic recommendations designed to help businesses and governments maximize opportunities and mitigate risks while harnessing the productivity potential of trends in technology and human capital:

- Promote synergies between technology and human capital development
- Strengthen anticipatory and data-driven decision-making
- Future-proof education and training systems
- Anticipate talent needs and develop workforce transition policies
- Accelerate adoption and diffusion of emerging technologies
- Invest in the trustworthiness of emerging technologies
- Strengthen critical infrastructure
- Bridge regional and sectoral gaps to mitigate productivity divergence
- Strengthen resilience to geopolitical disruption

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