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SCENARIOS FOR CIRCULAR CONSTRUCTION 2030

A SIMPLE FORESIGHT EXERCISE

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ASM – MARKET RESEARCH AND ANALYSIS CENTRE LTD.

More than a research agency

MOTIVATION

In nature there is no waste.
All materials are part of a cycle.

Waste is a human invention.
Nature does not have a waste problem.

Waste is a design flaw.

NATURE DOESN'T HAVE A DESIGN PROBLEM. PEOPLE DO.

- But this was not always the case...
- 350 million years ago the world was **littered** with dead trees piling on top of each other.
- The bacteria and fungi that chew trees in smaller bits did **not arrive for another 60 million years.**
- Nature evolved then and likely will again in the future... but if we don't want to wait 60 million years for that, **let's think about the future right now.**

ANY FUTURE SOLUTION IS SUBJECT TO:

- **Technical viability**

Waste is a design flaw.

- **Economic viability**
- **Social viability**

This much waste is a market failure.

What are the future markets?

What is the future of circular economy?

A FORESIGHT EXERCISE

- Premise: **Status quo is always wrong**

***Foresight is an art and a science
of anticipating the future***

(It is not forecasting, it does not deliver ready recipes)

- **Why then invest in a costly method that does not deliver tangible results?** (What happens when we fail to anticipate discontinuous change?)
- **Why is it so difficult to navigate change?** (Context, Ignorance, Inertia)

CIRCULAR CONSTRUCTION: DRIVERS OF CHANGE

- Given the **complexity of circular construction** a structured analytical framework is needed.

STEEP

Society

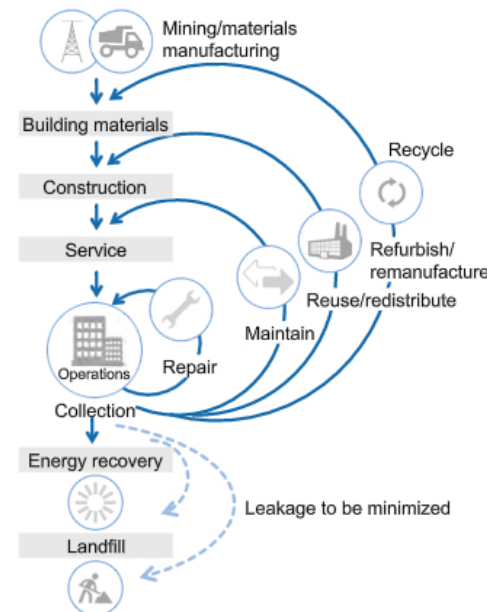
Technology

Environment

Economics

Politics

Figure 14: Circular Economy Principles in the Construction Value Chain⁶⁰



Source: Ellen MacArthur Foundation; World Economic Forum; The Boston Consulting Group

STEEP DRIVERS OF CHANGE

- **Society:** CSR, high skilled labor supply, aging, selling “safety”, mobility, ICT fashions/fads, urban development dynamics, social norms, shared and multi-purposed buildings, multifunctionality
- **Technology:** tele-working, e-communication, new production technologies, 3D printing, open innovation models, smart districts and buildings, energy efficient solutions,
- **Environment:** climate change, new trends in insulation and AC, higher energy efficiency standards, renewable energy trends.
- **Economics:** market concentration and entry barriers, resource prices, GDP growth, consumption patterns (pay-per-use vs ownership) and ‘peer economy’ (collaborative consumption), demand for new building vs renovation, trade,
- **Politics:** EU fragmentation and strategic security, international conflicts, transaction costs, policy harmonization, PAYT incentives, legal framework, government support...

BUILDING SCENARIOS

- Which drivers do you see as **most important?**
- Which drivers do you see as **most uncertain?**

- These are the scenario axes..

Consumer behavior & government policy

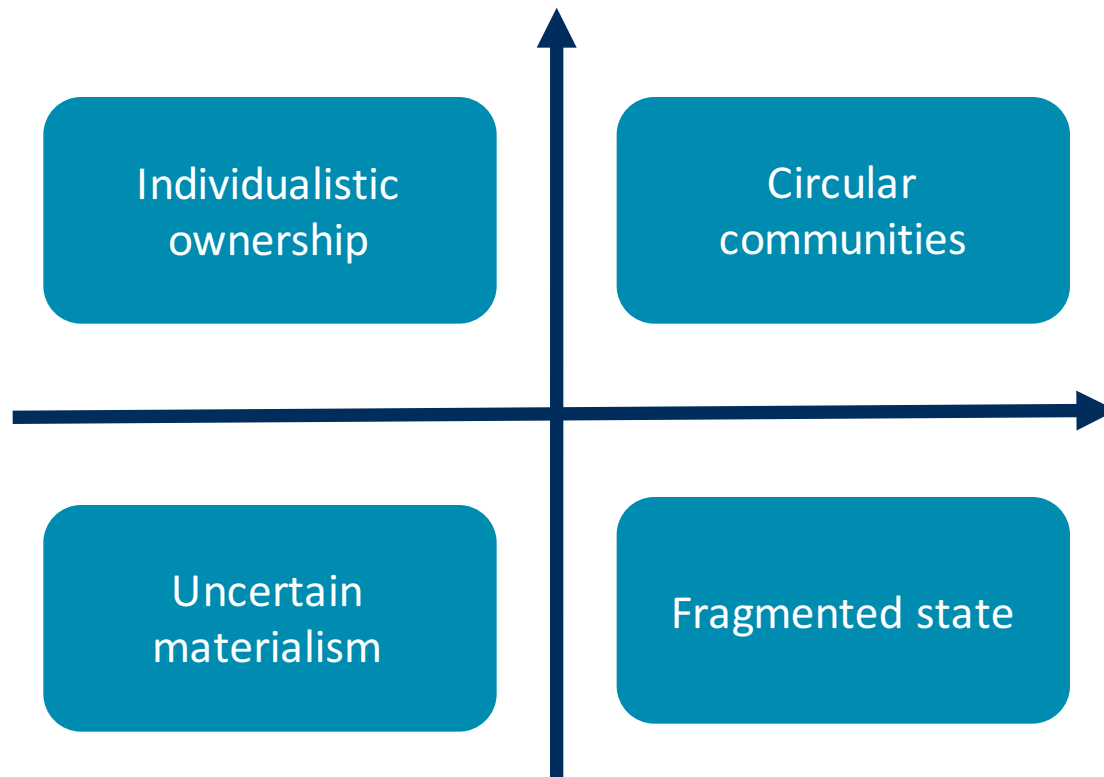
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SCENARIOS 2030

Government support:

EU Cohesion and Strategic Security / Policy and Tax Incentives



Consumer behavior:

(B2B, B2C) Collaborative consumption/production (peer economy), pay-per-use, CSR, multifunctionality

Thank you for your attention



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