



# **Envisioning pathways to Vision 2030: Global megatrends shaping the future of higher education**

**Compiled by the Office for Institutional Strategy  
September 2020**

**TOWARDS VISION 2030:  
CONTEXT AND  
BACKGROUND**

# Overview of strategic planning context

## Vision 2020 to 2030

- Launch of new name and brand - 2017
- Vision 2020 review – 2017/18
- VC's inaugural address - 2018
- VC's listening campaign - 2018
- Revised Vision 2020 approved by Council - 2018
- Organisational redesign process – 2018/19
- COVID-19 response plans - 2020

## Future global megatrends

- Towards Vision 2030:
  - How will we ensure readiness for the future?
  - How will global mega-trends impact our strategic positioning and priorities?
  - Futures thinking
  - V2030 stakeholder engagement and strategy development

# Our vision



**OUR VISION**  
is to be a  
**dynamic African**  
**university,**  
recognised for its  
leadership in  
generating  
**cutting-edge**  
**knowledge**  
for a  
**sustainable**  
**future.**

# Our mission

To offer a diverse range of life-changing educational experiences for a better world.



# OUR VALUES

DIVERSITY

EXCELLENCE

UBUNTU

SOCIAL  
JUSTICE AND  
EQUALITY

ENVIRON-  
MENTAL  
STEWARDSHIP

INTEGRITY

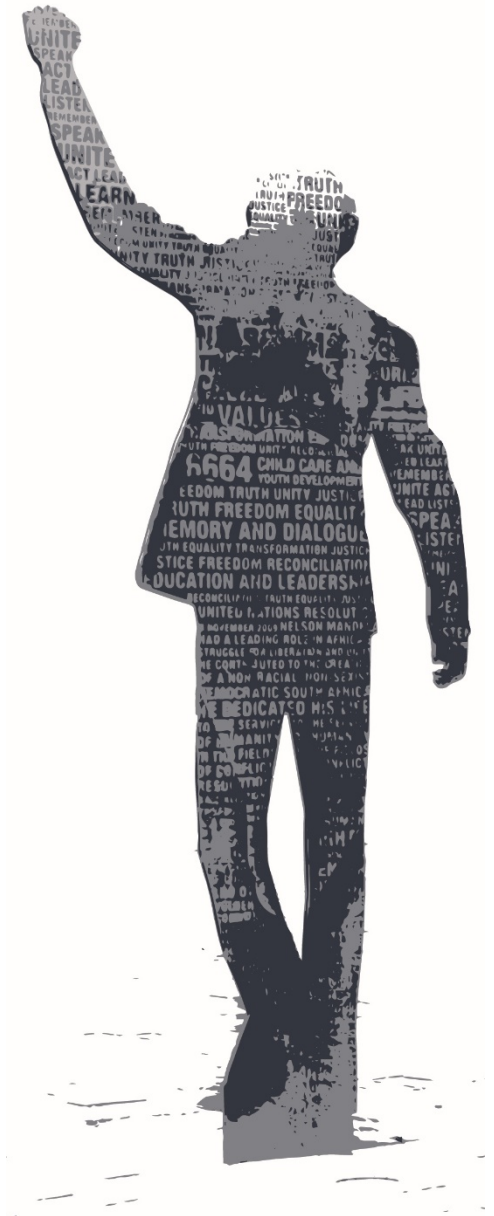
*“ We must be truthful and rigorous in the pursuit of a more equal and just society. We must have the courage to call it right in the most difficult circumstances. ”*

**- DIKGANG MOSENEKE**

Former Deputy Chief Justice,  
Constitutional Court of South Africa

# Strategic opportunities

- University in the service of society
- Repositioning engagement and responsiveness
  - how does our knowledge contribute to addressing grand societal challenges?
- Transformative, social justice orientation
- African-centred identity and ethos
- Student-centric ecosystem of support
- Employer of first choice for talented staff
- Strategic growth areas:
  - Ocean sciences
  - Medical school
  - Transdisciplinarity, including revitalising the humanities and critical Mandela studies
  - Sustainability science



**GLOBAL MEGA-  
TRENDS IMPACTING  
ON OUR FUTURE**



# Defining megatrends

The Oxford English Dictionary defines a megatrend as an important shift in the progress of a society or of any other particular field or activity.

Megatrends are large, transformative global forces that define the future by having a far-reaching impact on business, economies, industries, societies and individuals.

Source: [https://www.ey.com/Publication/vwLUAssets/ey-megatrends-report-2015/\\$FILE/ey-megatrends-report-2015.pdf](https://www.ey.com/Publication/vwLUAssets/ey-megatrends-report-2015/$FILE/ey-megatrends-report-2015.pdf)

Megatrends are the driving forces that define the world today and that of tomorrow. In other words, they are what we know about a likely future. Megatrends are characterised by being far-reaching, global patterns related to behaviour, mobility and environment.

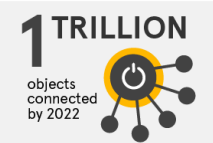
Source: <https://innovationenglish.sites.ku.dk/metode/megatrends/>

Global megatrends are macroeconomic and geostrategic forces that are shaping our world, and our collective futures in profound ways. The implications of these forces are broad and varied, and they will present us with both opportunities to seize and risks to mitigate.

Source: <https://www.pwc.com/gx/en/government-public-services/assets/five-megatrends-implications.pdf>

# Global megatrends shaping the future

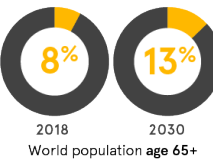
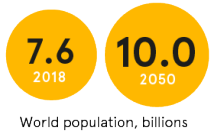
## IMPACTFUL TECHNOLOGY



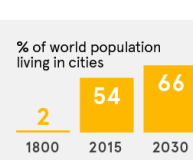
In 2017 top ranked GO player was beaten by AI



## EVOLVING COMMUNITIES



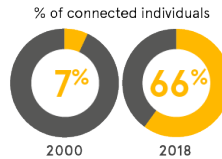
## RAPID URBANISATION



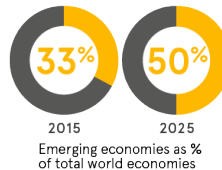
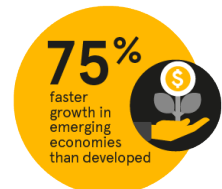
## EMPOWERING INDIVIDUALS



- Always ON
- Anywhere
- Predictive
- Personalised



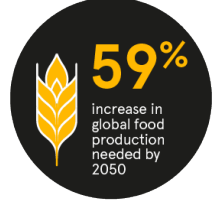
## ECONOMIC POWER SHIFT



## RESOURCE SECURITY



**LIFE CRITICAL**  
phosphorus will peak by 2050  
Clean energy materials at **CRITICAL LEVELS**



**#1 RISK GLOBALLY**  
identified by WEF is the water crisis

# Global megatrends shaping the future



## MEGATRENDS

The trends shaping work and working lives

### De-industrialisation



In 1961, 36% were employed in manufacturing, and 49% were employed in services



In 2011, 8% were employed in manufacturing, and 81% were employed in services

### Technology and globalisation

Volume of goods and services traded globally has increased more than fivefold since 1980

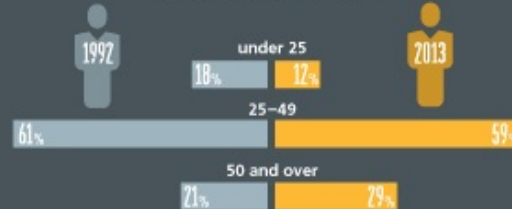


### Increased participation of women



In 1971, 37% of people in employment were women, in 2013 it was 47%

### Demographic change (by % of people in employment)



### Decline of collective institutions



Union membership has halved from 13 million in 1979 to less than 6.5 million in 2012

### Increased educational attainment



In 1993, 11% of the working-age population had a degree while 26% had no qualifications. By 2011 24% had a degree and 11% had no qualifications

### Changing employment relationship



Now read the full report and join in...

For in-depth analysis and commentary on the seven biggest changes of recent times, in work, the workplace and the workforce, access the full report by visiting: [cipd.co.uk/megatrends](http://cipd.co.uk/megatrends)

Tell us how these trends are affecting your world, and which other trends are on your radar. Join and follow the debate: [#megatrends](https://twitter.com/megatrends)

# Global megatrends shaping the future



# Global megatrends shaping the future

**1.5 million** people are added to the global urban population **every week**



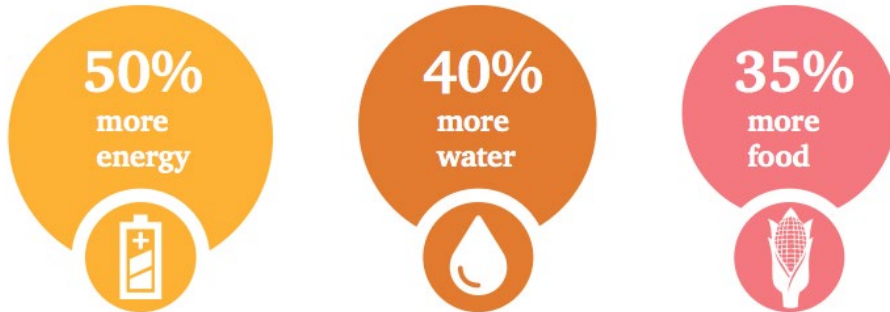
Source: PwC analysis (United Nations Population Division (2014))



**1 billion** expected increase in the world's population by 2025

**300 million** of that increase is predicted to come from those aged 65 or more

With a population of 8.3 billion people by 2030, we'll need...



2050

**G7**



\$69.3 trillion GDP

(US, Japan, Germany, UK, France, Italy, Canada)

**E7**



\$138.2 trillion GDP

(China, India, Brazil, Russia, Indonesia, Mexico, Turkey)

Source: National Intelligence Council's report. "Global Trends 2030: Alternative Worlds" (December 2012) [http://www.dni.gov/files/documents/GlobalTrends\\_2030.pdf](http://www.dni.gov/files/documents/GlobalTrends_2030.pdf)

Source: PwC Analysis



# Zooming Out to the World

## GLOBAL MEGATRENDS

### INDIVIDUALS AND SOCIETY



Changing demographics with ageing population



Better education



More technology and information and communication technology (ICT) enabled

*“Just as we shape the world, the world is shaping us”*

### PHYSICAL ENVIRONMENT



Scarcity of natural resources



Accelerating urbanisation



Climate change

### GLOBAL ECONOMY



Interconnected global economy



Innovation and technology as key drivers



Shift of economic power to the East



Rise of the global middle class

# Global megatrends



# Megatrends

## Demographics

Digital health and tracking devices

Ageing societies

Millennials and changing consumer behaviour

## Multipolar World

Geopolitical diffusion of power

Rise of emerging and frontier markets

Growing global wealth

Increasing conflicts

## ESG

Climate change

Social responsibility

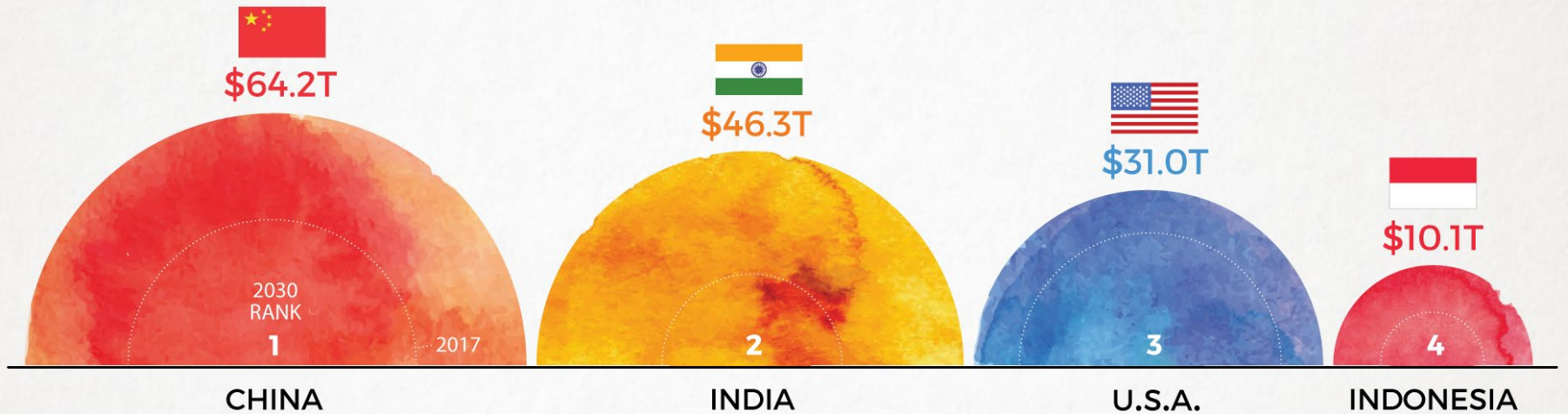
Corporate governance

## Innovation

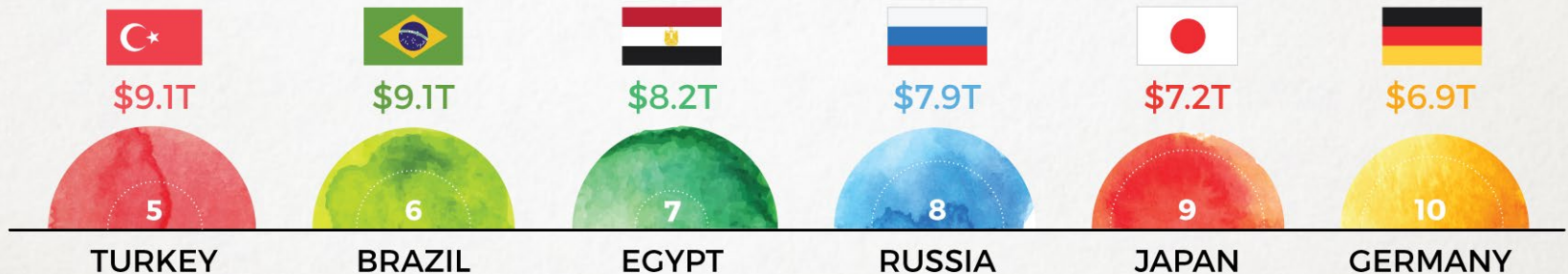
Artificial Intelligence, Robotics, Internet of Things, Digitalization



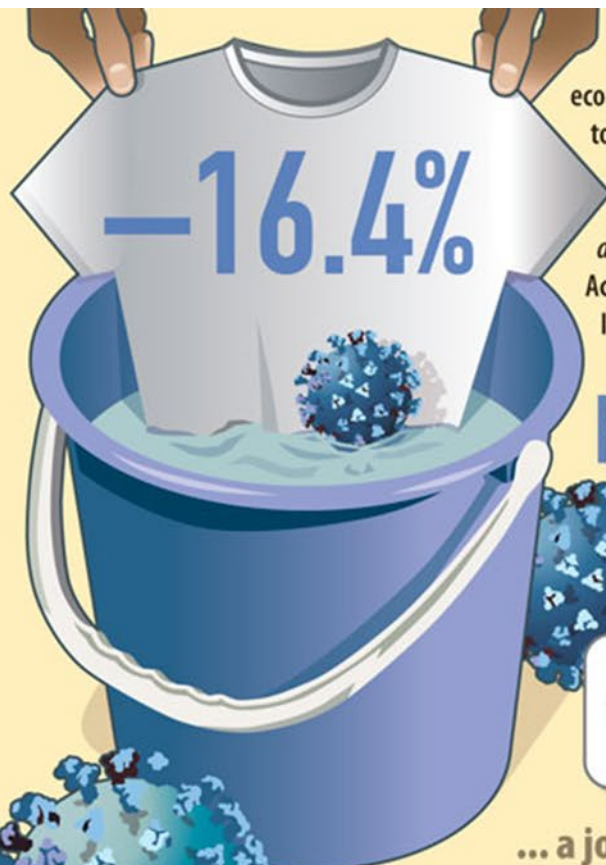
# Global megatrends: The rise of the East



## TOP 10 COUNTRIES, BY GDP (PPP) IN 2030



# Impact of COVID-19 on South African economy



The percentage by which the economy contracted from the first to the second quarter of 2020 (quarter-on-quarter GDP, seasonally adjusted and annualised).

According to economist Isaah Mhlanga, this is equivalent to

**R512-billion**

... the repo rate is stable ...

The repurchase interest rate was cut by 300 points this year and is now

**3.5%**

... a jobs bloodbath is anticipated

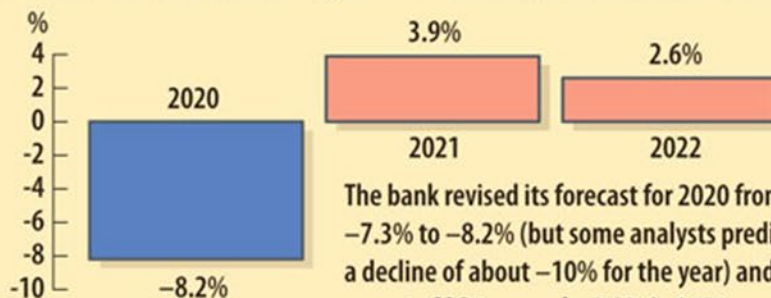
Jobs numbers for the second quarter are yet to be released, but analysts predict an increase from the current unemployment rate of 30.1%

Predicted unemployment  
**45% to 50%**

## Honey, the virus shrunk the economy, but it'll grow in 2021

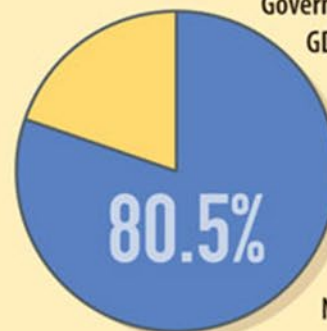
The shape we're in after April, May and June 2020

The SA Reserve Bank says GDP will fall some more ...



The bank revised its forecast for 2020 from -7.3% to -8.2% (but some analysts predict a decline of about -10% for the year) and it expects GDP to grow by 3.9% in 2021

... government debt is ballooning ...



Government debt will rise to 80.5% of GDP in this fiscal year, compared with a projection of 65.6% in February. This could see debt levels exceed 100% of GDP by 2024-25 and rise to almost 114% by 2028-29, said Finance Minister Tito Mboweni at Nedlac early this year



Graphic: JOHN McCANN Compiled by: TSHEGOFATSO MATHE Data sources: STATS SA, BLOOMBERG, ALEXANDER FORBES, SARB

# United Nations sustainable development goals

## SUSTAINABLE DEVELOPMENT GOALS



# Elements of sustainable development





# Global megatrends: Impact of COVID

## Accelerating the future **MEGATRENDS**



**Aging world ...** shift from young to old

45% increase in world's over 60 year olds by 2030, 80% of them in Asia



**Booming Asia ...** shift from west to east

Asia's new middle class worth \$10 trillion by 2030, 66% of global middle



**Cognitive tech ...** shift from automation to intelligence

60% of all jobs will be at least 30% automated, by 2030, plus many new jobs



**Dense living...** shift from nations to megacities

45 megacities, over 10 million, 33 of them in Asia, and then in Africa



**Eco renewal...** shift from crisis to circularity

Demand growth by 2030, 35% more food, 40% more water, 50% more energy

© Peter Fisk 2020



# Global megatrends: Impact of COVID

## Driving human and tech **INGENUITY**

### Digital self



Connected  
Belonging  
Enabled

### Intelligent health



Digital  
Analytical  
Tracked

### Distributed work



Agile  
Remote  
Freelance

### Platform retail



Automated  
Cashless  
Delivered

### Personal mobility



Individual  
Electric  
Local

### Lifelong education



Flexible  
Options  
Hybrid

More **intelligent** solutions ... more **liquid** businesses

© Peter Fisk 2020

# Global megatrends: Impact of COVID

## Most likely fallout for the world

Prolonged recession of the global economy	68.6%
Surge in bankruptcies (big firms and SMEs) and a wave of industry consolidation	56.8%
Failure of industries or sectors in certain countries to properly recover	55.9%
High levels of structural unemployment (especially youth)	49.3%
Tighter restrictions on the cross-border movement of people and goods	48.7%
Weakening of fiscal positions in major economies	45.8%
Protracted disruption of global supply chains	42.1%
Economic collapse of an emerging market or developing economy	38.0%
Cyberattacks and data fraud due to a sustained shift in working patterns	37.8%
Another global outbreak of COVID-19 or different infectious disease	30.8%
Additional unemployment from accelerated workforce automation	24.8%
Exploitation of COVID-19 crisis for geopolitical advantage	24.2%
Governmental retention of emergency powers and/or erosion of civil liberties	23.3%
Exacerbation of mental health issues	21.9%
Fresh surge in inequality and societal divisiveness	21.3%
Sharp increase in inflation globally	20.2%
Humanitarian crises exacerbated by a reduction in foreign aid	19.6%
Anger with political leaders and distrust of government	18.4%
Higher risk of failing to invest enough in climate resilience and adaptation	18.2%

# Africa Agenda 2063



## AGENDA 2063 The Africa We Want

### Aspiration 1

A prosperous Africa based on inclusive growth and sustainable development

### Aspiration 2

An integrated continent, politically united and based on the ideals of Pan Africanism and the vision of Africa's Renaissance

### Aspiration 3

An Africa of good governance, democracy, respect for human rights, justice and the rule of law

### Aspiration 4

A peaceful and secure Africa

### Aspiration 5

An Africa with a strong cultural identity, common heritage, values and ethics

### Aspiration 6

An Africa where development is people-driven, unleashing the potential of its women and youth

### Aspiration 7

Africa as a strong, united and influential global player and partner





# Africa's demographic dividend



Number of people aged 65 or older will **double** to **1 billion** by 2030<sup>1</sup>

**90%** of the global youth reside in developing nations<sup>2</sup>



Africa's population is projected to **double** by 2050, while Europe's is expected to **shrink**<sup>3</sup>



Almost **80%** of companies say their customers are changing how they access goods and services<sup>4</sup>

**47%** of occupations in advanced economies are at 'high risk' of being automated in the next **20 years**<sup>5</sup>



#### Sources:

1. McKinsey - Global Forces: how strategic trends affect your business (2010)
2. International Labour Organization - Global Employment Trends for Youth (2013)
3. PwC - Five global megatrends continue to advance (2015)
4. Economist Intelligence Unit - Supply on demand: Adapting to change in consumption and delivery models (2013)
5. Oxford Martin School - The Future of Employment: How Susceptible are Jobs to Computerisation (2013)

The biggest challenge in high-income countries is that the traditional university-going population is shrinking while the non-traditional, university population over age 24 and post retirement age is continuing to expand.

In Africa and parts of Asia there is a huge demographic dividend due to a burgeoning youth and this offers opportunities to established higher education institutions with international strategies.

By 2030, an estimated increase of nearly 120 million students in higher education and 2.3 million internationally mobile students.

# Global megatrends shaping the future

## THE GIG ECONOMY ~ New opportunities

The way work is organised is changing and remote working is possible for more and more people. The rise of the “gig economy” means that work is no longer tied to a steady job.

## COLLABORATION ~

### Working together

A greater emphasis on teamwork means that social skills are becoming more highly prized in society.

## GLOBALISATION ~ It's a small world

With global mobility on the rise, classrooms are becoming ever more diverse.

## DIGITALISATION ~

Three out of four people access the Internet daily or almost every day to connect with friends and social networks and access information or services.

## GET READY ~ Linking education with the world of work

Employers and educators collaborate to help students make the transition from education to work.

## LIFELONG LEARNING ~

### Learning to work, working to learn

Longer working lives and rapidly changing skill demands increase the need for continuous learning throughout life.

## ENVIRONMENTAL SECURITY ~

A change in the weather  
The impact of climate change is seen in higher temperatures, rising sea levels and more frequent extreme weather events.

**THE FUTURE WORLD  
OF WORK IS UPON  
US**

# Future of work

The jobs of the future are expected to be more machine-powered and data-driven, but they will also require uniquely human skills such as complex problem-solving, critical thinking, interpretation, design thinking, creativity, originality and initiative, resilience, flexibility, and emotional intelligence.



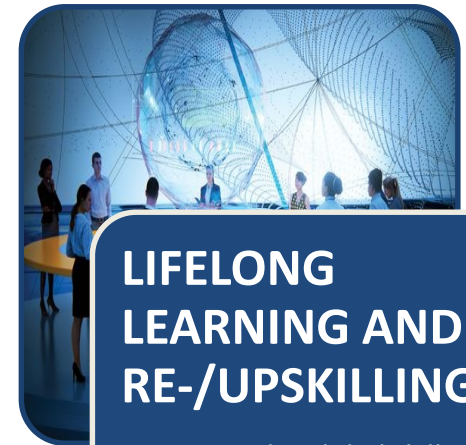
## FLEXIBLE DEFINITIONS OF WORK AND THE WORKPLACE

- Employees expect flexibility in schedule, place of work and benefits.
- Reimagined workplaces - completely distributed and dependent on virtual interactions.



## GIG ECONOMY

- Workers freelance exclusively or to augment salaried work.
- Blended workforce - traditional full-time employees to managed services and outsourcing, independent contractors, gig workers, and crowdsourcing.
- Growing focus on entrepreneurship.



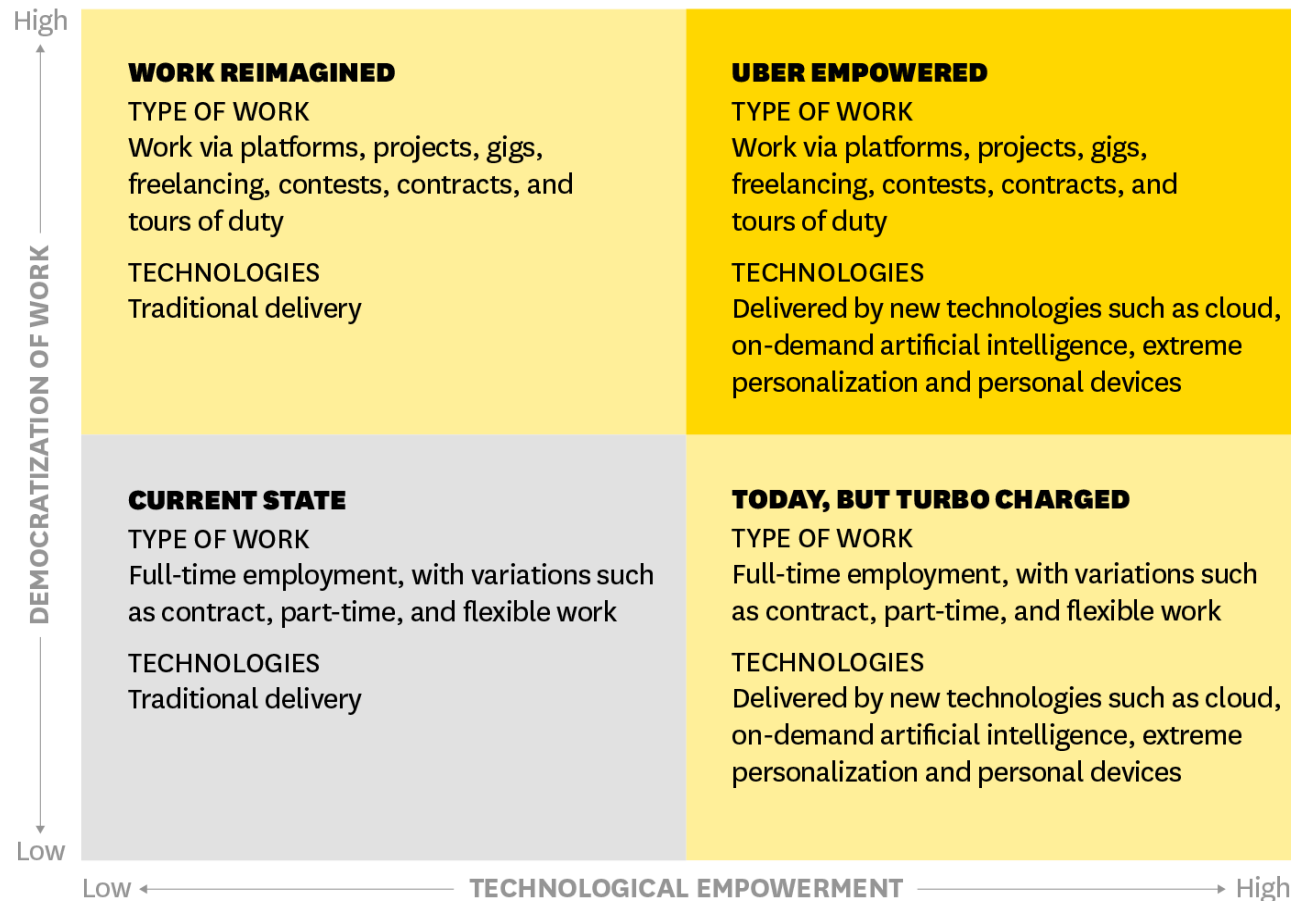
## LIFELONG LEARNING AND RE-/UPSKILLING

- By 2030 the global skills deficit is expected to reach 85.2m workers.
- Millions of workers will need to be reskilled to transition into new jobs and keep pace with the new world of work.

# Future of work

## The 4 Kinds of Work in the Future

How the democratization and technological empowerment of work will affect organizations.



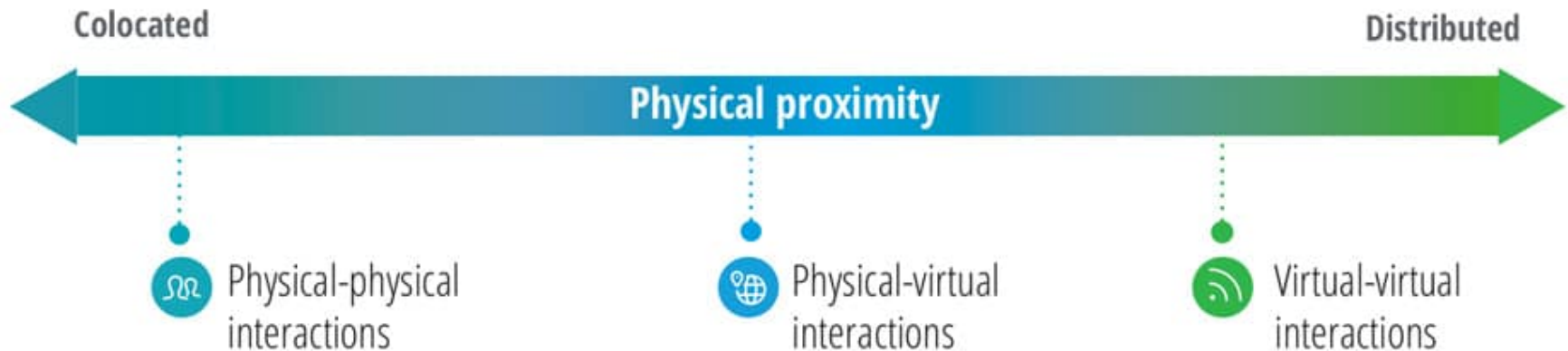
SOURCE CHREATE DATA, 2015

© HBR.ORG

# Future of work

FIGURE 4

## Workplaces are also shifting



Source: Deloitte analysis.

Deloitte Insights | [deloitte.com/insights](https://deloitte.com/insights)

# Human-centred agenda for the future of work

The ILO human-centred agenda calls for placing people and the work they do at the centre of economic and social policy.

Three pillars of action to drive growth, equity and sustainability for present and future generations:

- Increase investment in people's capabilities
- Increase investment in the institutions of work
- Increase investment in decent and sustainable work

## DELIVERING THE SOCIAL CONTRACT: A HUMAN-CENTRED AGENDA





# Multi-generational workplace



## Mind the Gap: Managing Five Generations in the Workplace



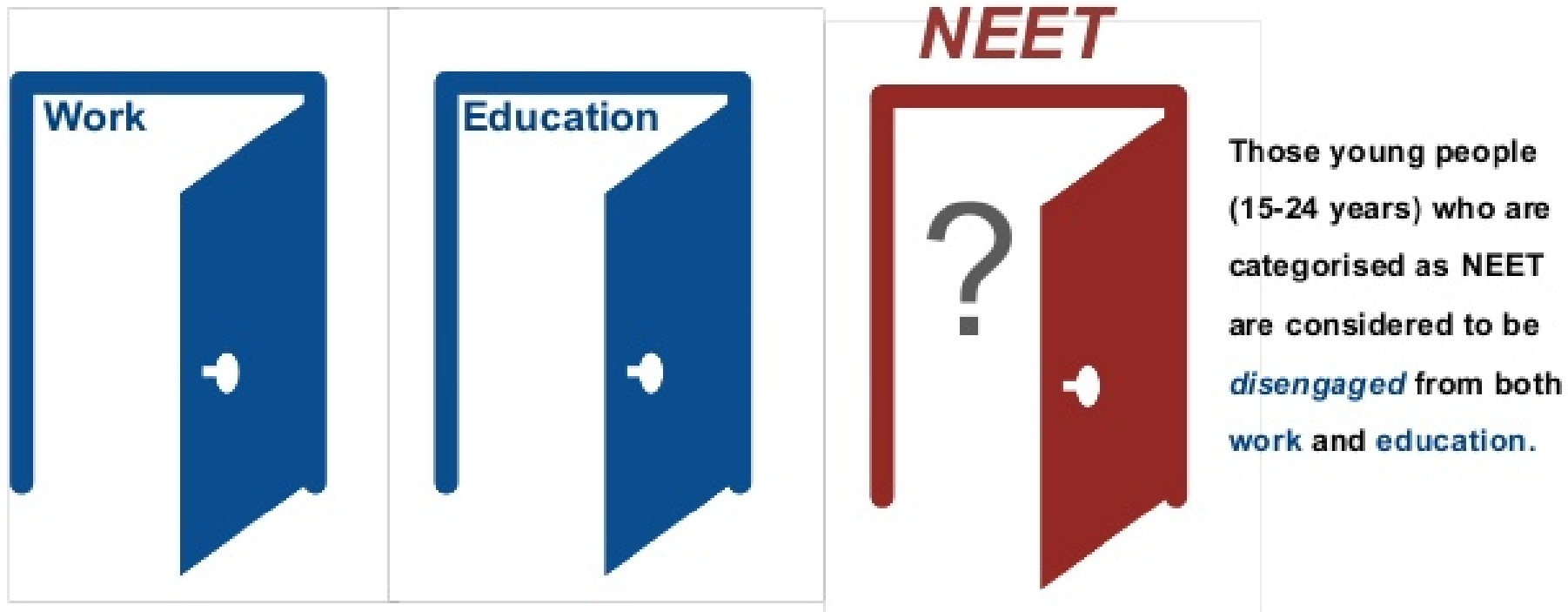


# Multi-generational workplace

## FIVE GENERATIONS WORKING SIDE BY SIDE IN 2020



# WHAT IS (NEET) NOT IN EMPLOYMENT, EDUCATION OR TRAINING?



*Youth NEET rate is calculated as the total number of youth who are NEET as a proportion of the total youth-specific working-age population*

# Youth not in employment education or training (NEET)

- The number of unemployed people in South Africa increased from 4.6 million in Q1:2010 to 7.1 million in Q1:2020.
- The unemployment rate among the youth is higher irrespective of education level. Significant increase in graduate unemployment (Q1 2020 = 33.1% of all graduates aged 15 – 24 years were unemployed).
- Approximately 3.5 million (34.1%) out of 10.3 million young people aged 15-24 years were not in employment, education or training (NEET). The overall NEET rate increased by 0.8% in Q1:2020 compared to Q1:2019.

**READYING GRADUATES  
FOR THE FUTURE**

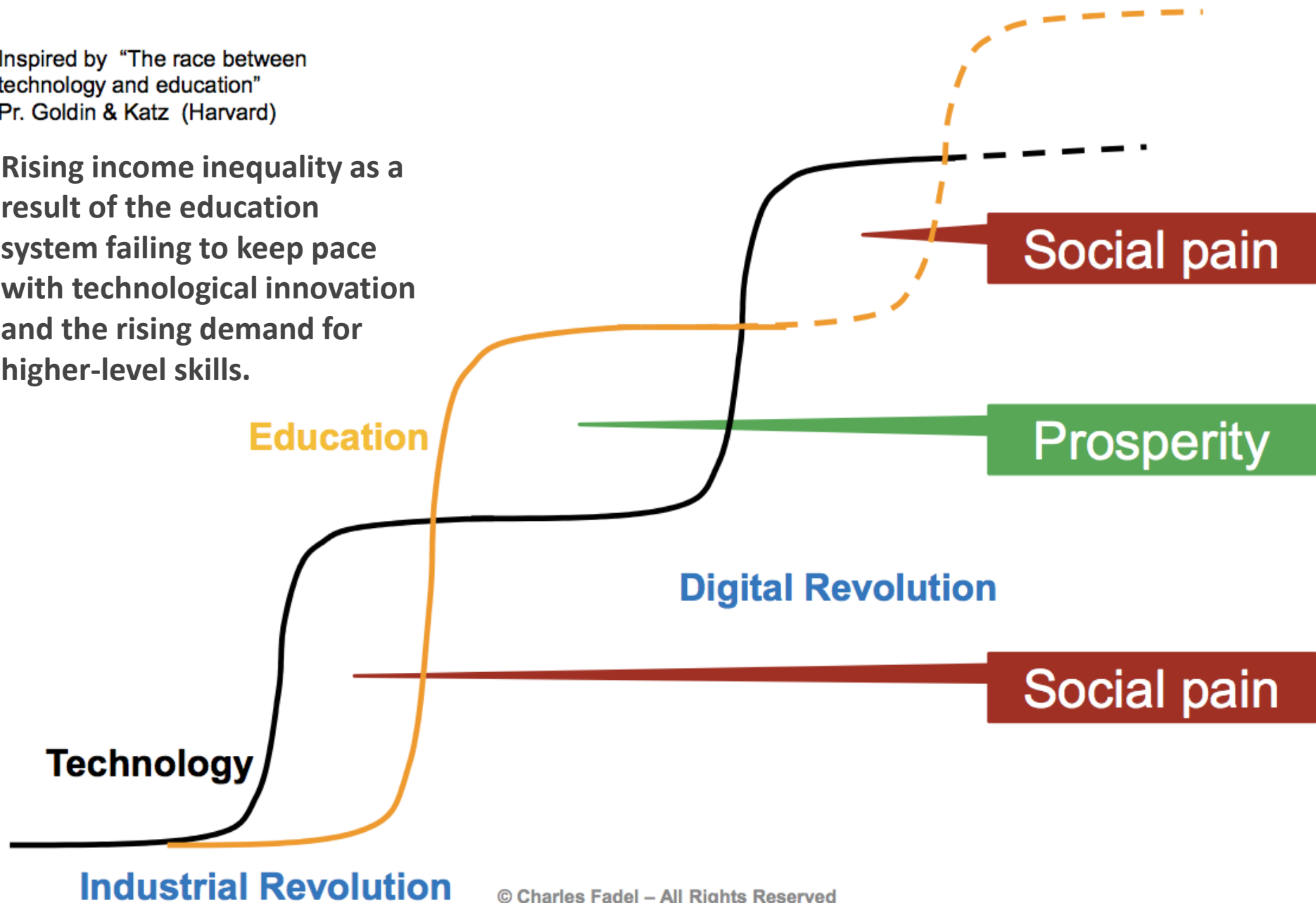
Don't prepare students  
for something. Prepare  
them for anything.  
@E\_Sheninger



# The Race between Technology and Education

Inspired by "The race between technology and education"  
Pr. Goldin & Katz (Harvard)

Rising income inequality as a result of the education system failing to keep pace with technological innovation and the rising demand for higher-level skills.



**Industrial Revolution**

**Digital Revolution**

**Social pain**

**Prosperity**

**Social pain**



# Future skills

With disruption driving workforce changes, human and digital skills are now considered foundational, with the ‘ability to learn’ regarded as a graduate’s most valuable asset.

## Top 10 Skills

### in 2015

1. Complex Problem Solving
2. Coordinating with Others
3. People Management
4. Critical Thinking
5. Negotiation
6. Quality Control
7. Service Orientation
8. Judgment & Decision Making
9. Active Listening
10. Creativity

### in 2020

1. People Management
2. Complex Problem Solving
3. Critical Thinking
4. Creativity
5. Coordinating with Others
6. Emotional Intelligence
7. Judgment & Decision Making
8. Service Orientation
9. Negotiation
10. Cognitive Flexibility

### in 2030

1. Judgment & Decision Making
2. Fluency of ideas
3. Active Learning
4. Learning Strategies
5. Originality
6. System Evaluation
7. Deductive Reasoning
8. Complex Problem Solving
9. Systems Analysis
10. Monitoring

# 21<sup>st</sup> century skills

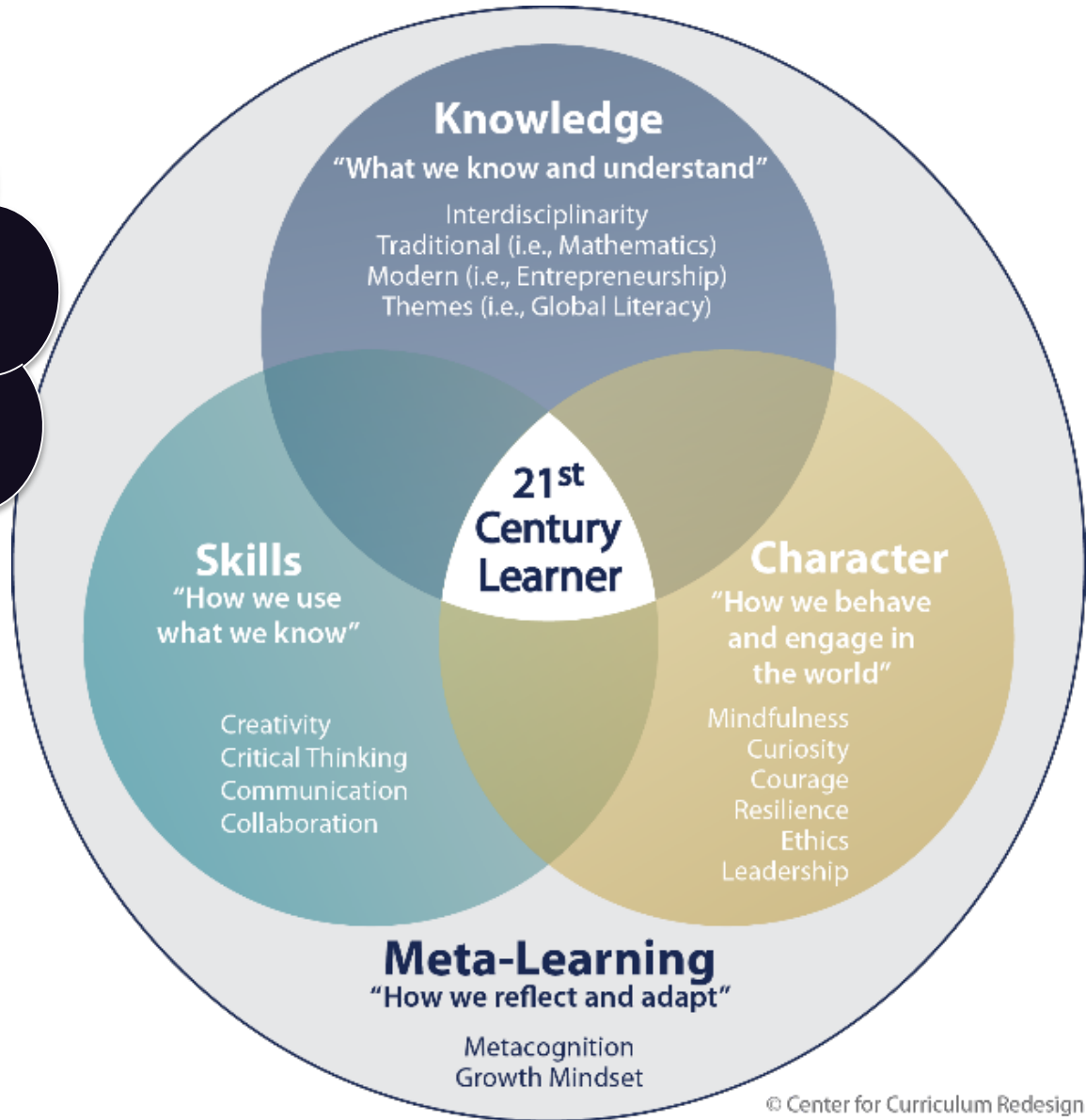
To do well in the 21st century, students need more than traditional academic learning. They need foundational literacies, **competencies** and **character qualities**.





# Knowledge, skills and attributes for the future

How should our curricula be designed to cultivate these graduate attributes and skills?



# UNESCO Education 2030 commitments

## The Education 2030 commitments

The agenda rests on three central pillars...



to be achieved through 10 targets...



Publicly-funded, primary and secondary education



Early childhood development and pre-primary education



Access to all levels of education



Relevant skills for work



Gender equality and inclusion of marginalised groups



Youth and adults literacy and numeracy skills



Learning to live together and protect nature



Safe and inclusive learning environments

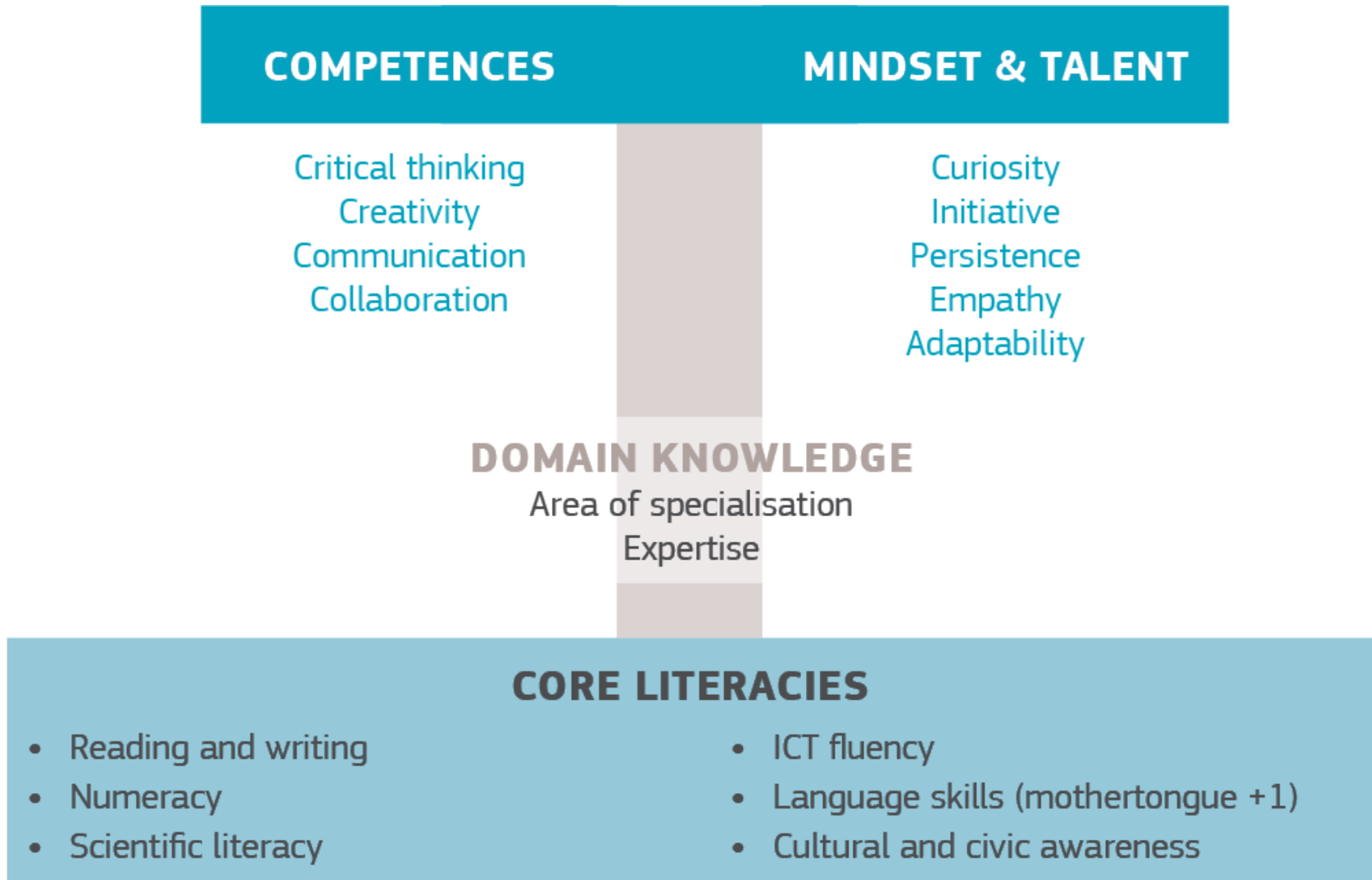


More scholarships for students from developing countries

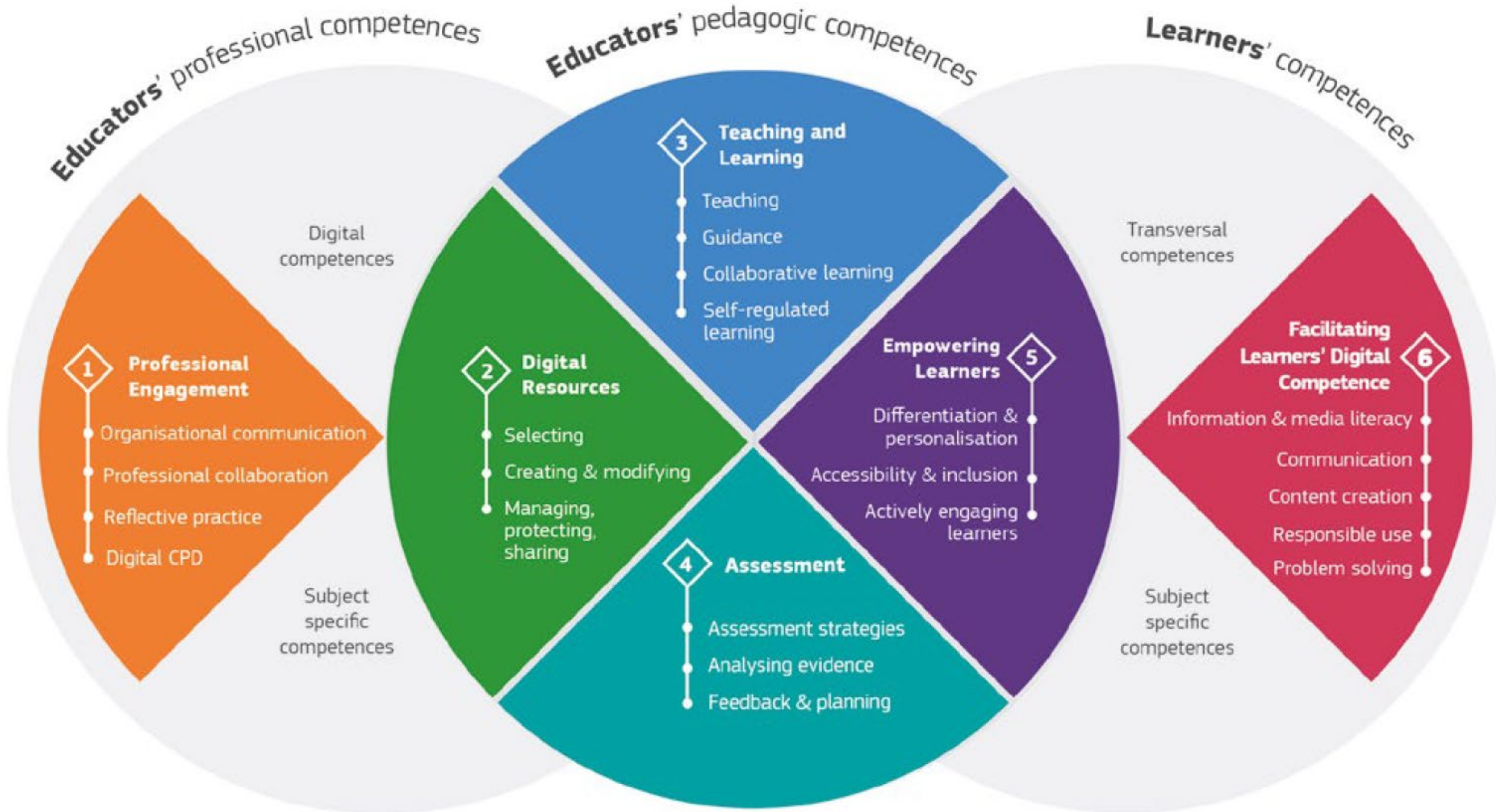


Well trained teachers who are valued

# T-shaped professionals



# Digital competences



**WHAT NEXT?  
RESPONDING TO GLOBAL  
MEGA-TRENDS**

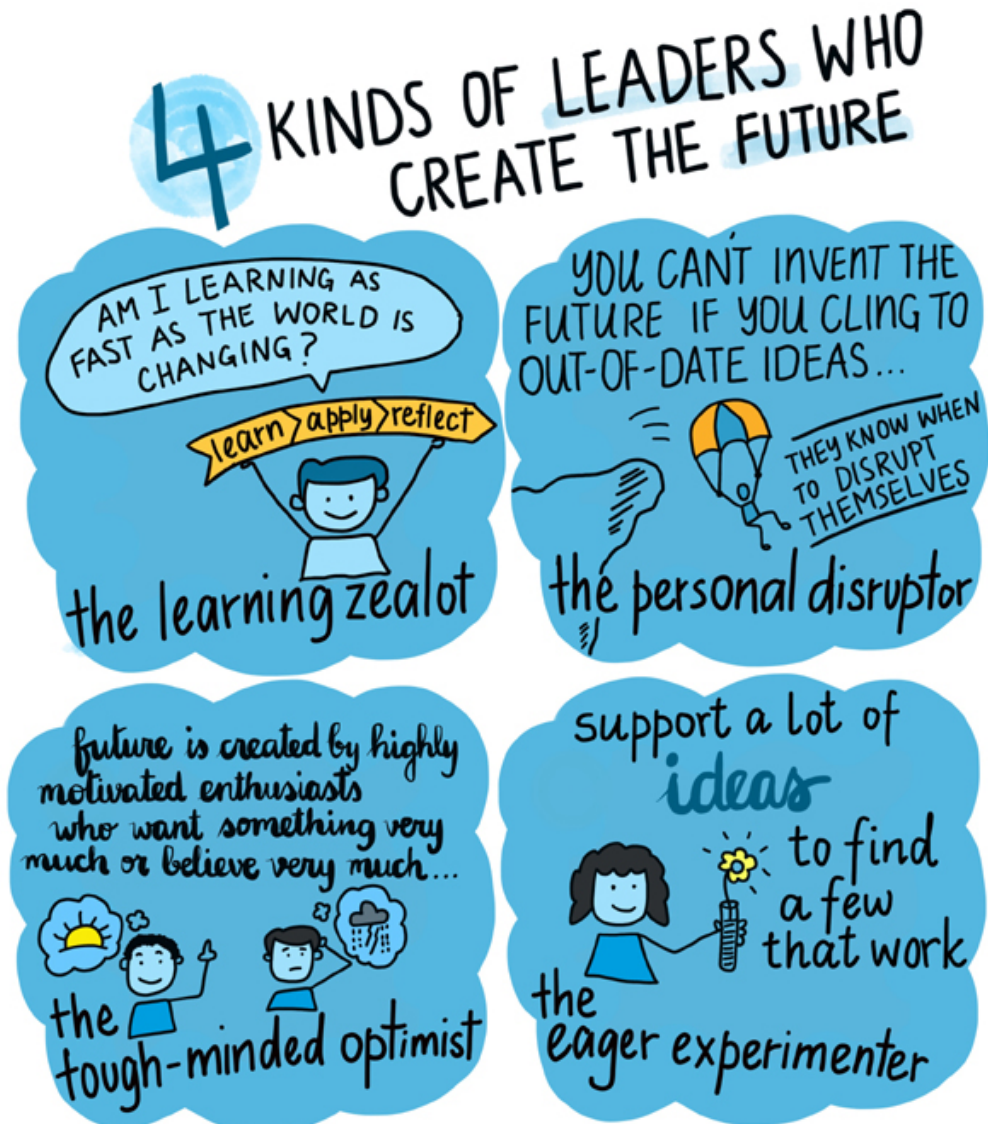


# Responding to global mega-trends

- 1. Identify trends not on the radar.** Which of the trends are on the organisational radar in terms of their possible implications? Which ones are being ignored and should be taken more seriously? What other trends are key?
- 2. Focus on (virtual) geographies that matter.** How might these megatrends look in each region and country?
- 3. Think through impacts on different groups of people.** How might these megatrends impact poor/marginalised populations? Which groups are inadvertently being privileged or excluded? What does this mean for how to support those struggling under conditions of poverty or social marginalisation?
- 4. Figure out opportunities and challenges using a systems perspective.** What do we assume about each megatrend and how it will affect others? What new options can emerge within these interactions to tackle poverty and inequality?
- 5. Decide which trends to take on and what roles to play.** What kind of agent of change and what kind of change does it want to support in relation to each megatrend? Such discussions can help clarify organisational identity and mission amid global changes.
- 6. Reimagine partnerships, roles and possibilities.** Are new partnerships spotted and fostered? Is the university well placed to be part of an intervention that aligns with its identity, mission and strengths? What do the trends suggest for other key operational assumptions, such as the ability to raise funds?

# How to approach the future?

- **Ignore** - argue that the future is out of reach and that there is plenty to focus on in the present.
- **Prepare** - being agile, alert, and responsive to changes and trends and doing what it takes to position ourselves for the unknown.
- **Anticipate** - notice trends and develop the ability to proactively track what is likely to shape the future.
- **Create** - be active agents in creating the future.



**VISION 2030:  
LET'S CO-CREATE THE  
FUTURE TOGETHER**

Change the World



[www.mandela.ac.za](http://www.mandela.ac.za)