



WE DO  
**QUALITY WORK.**

# AN OVERVIEW OF PROGNOS



Independent,  
expert,  
practical



Research,  
consulting,  
supervision



Founded  
1959 in  
Basel

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## WELL-RESPECTED

The results of our studies are acknowledged by decision makers of all political stripes.

## EXPERIENCED

Almost 60 years on the market,  
250 to 300 projects per year.

## UNBIASED

Not beholden to any school of  
thought or political direction.

## INTERDISCIPLINARY

200+ excellent minds from  
various academic disciplines.

## FORWARD-LOOKING

Always with an eye toward the future:  
digitalisation, globalisation, demography  
and climate change. Focus on long-term  
prognoses and scenarios.



Interview

# INDEPENDENCE IS IN OUR DNA

Christian Böllhoff has been managing partner at Prognos for more than 15 years. He places great value on political independence and the drive to help shape society.

## How is Prognos different from other economic research institutions?

” We’re a self-financed, independent enterprise, and as such, we’re not beholden to any political direction or philosophy. We aren’t backed by any political party that looks over our shoulders. With every enquiry, we have the freedom to decide whether we want to accept the contract or not. We only take on work if we’re certain that we can live up to our standards of economic quality, satisfy the customer and stand up for our results in front of the expert community.

## What advantages do customers have?

” The most decisive one is that we know how economics work. Since we don’t accept any public or political subsidies or other money, we think like a business enterprise. For the same reason, we don’t have to satisfy anyone politically either. That benefits customers who want to use our results publically. A voice free of political constraints, which can be seen working for various sides of various issues, carries more weight in debates. Political decision makers know that we’re independent. We work for both employers and labour unions, for environmental organisations as well as energy companies and state institutions. As a Swiss company, neutrality was very important to us right from the start. Neutrality entails solidity, substance, quality and clear-headed analysis. It’s in our company’s DNA, and our employees stand behind this idea.

## But don’t your studies and analyses influence political decisions?

” No, that’s not our role. We provide a good informational basis to people who want to make political decisions or inform the public. We give arguments a foundation. That’s the difference between us and political consultants. If we draw up a prognosis and determine that by 2025 society will need a certain number of additional health nurses, it’s not our job to translate that knowledge into action. We come up with findings and make recommendations. That’s why we don’t work with political parties. That’s the difference between us and other institutions.

## You look forward 20 or 30 years in the future. How do you do that?

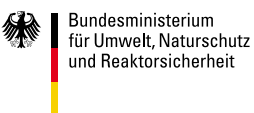
” Of course, we can’t predict the future. No one can. But we provide a solid basic orientation by using the latest methods of prognostication in order to arrive at the most accurate statements possible. This is a very necessary service! Someone who wants to make a major investment in a new wind farm or wants to change a pension system needs as precise an idea as possible of how things could develop in the next 20 or 30 years. Our scenarios show how systems may react and what sorts of deviations are possible. That’s the only way planners can make informed decisions. Sometimes our long-term prognoses also contain warnings about how things could develop if changes aren’t made right now. Such considerations are very important, for instance, with demography and climate change. In such cases, we’re often happy if things turn out differently than we predicted. \_

# WHO HAS PUT THEIR TRUST IN US?



Our customers come from various sectors:

- federal and regional ministries and other public sector institutions
- European institutions
- NGOs, think tanks and foundations
- large corporations and small- and medium-sized businesses
- interest groups such as economic and social associations, employers and trade unions
- public enterprises
- decision makers and planners in towns and local regions
- media outlets



# THE CIRCLE OF SEVEN PROFESSORS

## The beginning

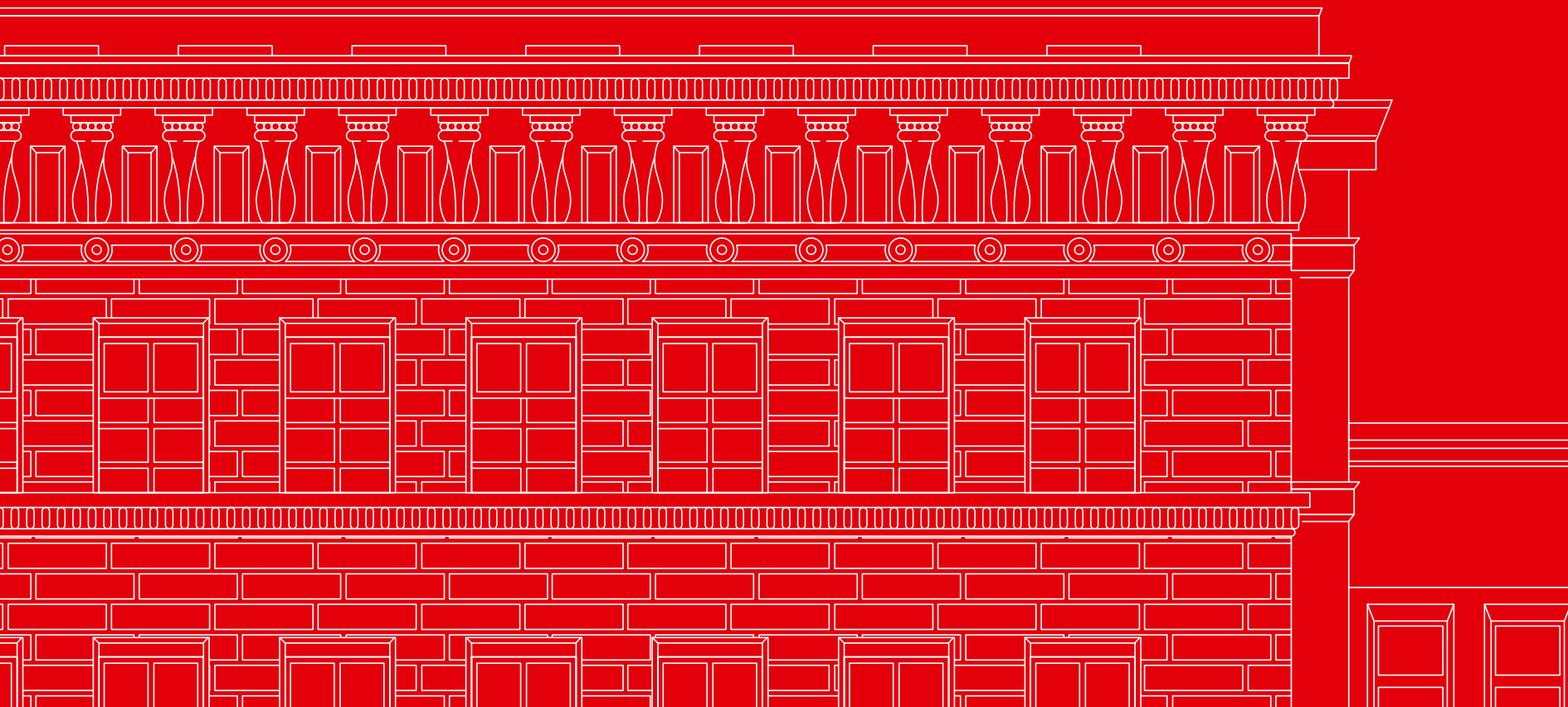
**1959** Everything began in a simple university office in Basel. There, the seven founders of Prognos, who had 75,000 Swiss francs in start-up capital, met in 1959 to found a new sort of research institute: Prognos.

The name Prognos was carefully chosen to express the direction of the company. Back then, the first companies in the United States were beginning to use their economic expertise to make money. That was precisely what the spiritus rector of Prognos, Professor Edgar Salin, envisioned. Instead of assembling intellectuals in caps and gowns, Salin wanted to create the first Swiss think tank – a concept almost unknown in Europe at that time. Thanks to Salin's excellent contacts and the rapidly growing reputation of the young institute, Prognos quickly became an insider's tip among established academics.

## UNIVERSITY OF BASEL

Prognos' first office was on the top floor at St. Alban-Graben 8 in Basel. Today it belongs to the local university's art history department. In the early years Salin kept a close rein on the company, often handing out royalties for people's work sitting behind his desk with a simple "here you go!" The first Prognos studies involved research concerning investments, such as on markets for household appliances in Western Europe for AEG or the sales possibilities for Portuguese agricultural products in Germany. Business was up and down in those early years. Periods of dramatic idleness, in which only the office ping pong table was put through the ringer, alternated with bursts of activity in which experts worked frantically to finish extremely demanding reports. But the company was already out of the red by the early years of the "Golden Sixties."

**Today Prognos is represented by more than 200 experts and local offices not only in Basel, but in Brussels, Vienna, Berlin and other regional capitals in Germany. \_**



# WHAT MAKES US SPECIAL

## *The views of our employees*

Prognos employs more than 200 experts from a variety of academic disciplines. They think analytically and contextually - and work the same way.

### **Dr Almut Kirchner**

Prognos Vice-Director, Energy and Climate Protection Policy since 2002  
Physicist, Basel



” **Soberly and pragmatically, we at Prognos demystify the challenges of energy and climate protection policy and make them less frightening.** My team and I use differentiated modeling tools to describe the complexity of energy systems and shed light on the facts from various vantage points. In the process, we call upon people's differing talents and keep developing our research areas. I appreciate the fact that at Prognos, we deal with and discuss not only energy systems but their connections with the business sector, with questions of distribution and other infrastructures.

” **I value the work done in our interdisciplinary project teams, where we emphasise frank discussion as a way of arriving at methodologically solid results that stand up to scrutiny.** As a Prognos management consultant, I help our customers improve by becoming better organised, more strategic and more productive. Quality consulting also means giving people honest answers.

### **Jan Tiessen**

Prognos Senior Project Director since 2010  
Politics and Administrative Scientist, Berlin



### **Dr Axel Seidel**

Prognos COO since 2001  
Trained Salesman, Düsseldorf

” **In terms of quality, everyone at Prognos pulls together – that's our defining characteristic.** As COO, I'm responsible for the operative business, including processes that work. We spend a lot of time discussing things, but sensible quality management is never up for debate. We support life-long learning and personal development as a matter of course in order to be able to offer our customers the best advice on the basis of the latest information and techniques.

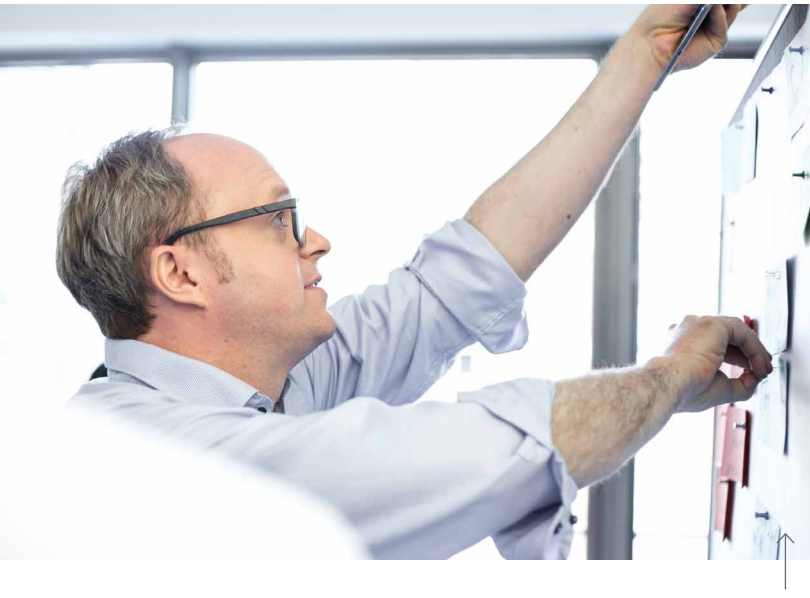
” **I like the range of subject areas at Prognos.** I wouldn't want to do the same thing day in, day out. In my projects, I constantly deal with new, politically hot button topics. We also change the methods we use from project to project. This variety makes my work especially interesting. It also benefits our customers since it ensures that we keep up to date.

### **Cordula Klaus**

Prognos Consultant since 2014  
Economist, Berlin



” **Future-oriented thinking and personal freedom are especially important for my work.** I am in charge of directing the development and adaptation of digital technologies and business models at Prognos. The digital transformation of society is proceeding by leaps and bounds. Many of my colleagues have also devoted themselves to the future – that creates an ideal atmosphere in terms of both personality and the expertise needed to anticipate developments.



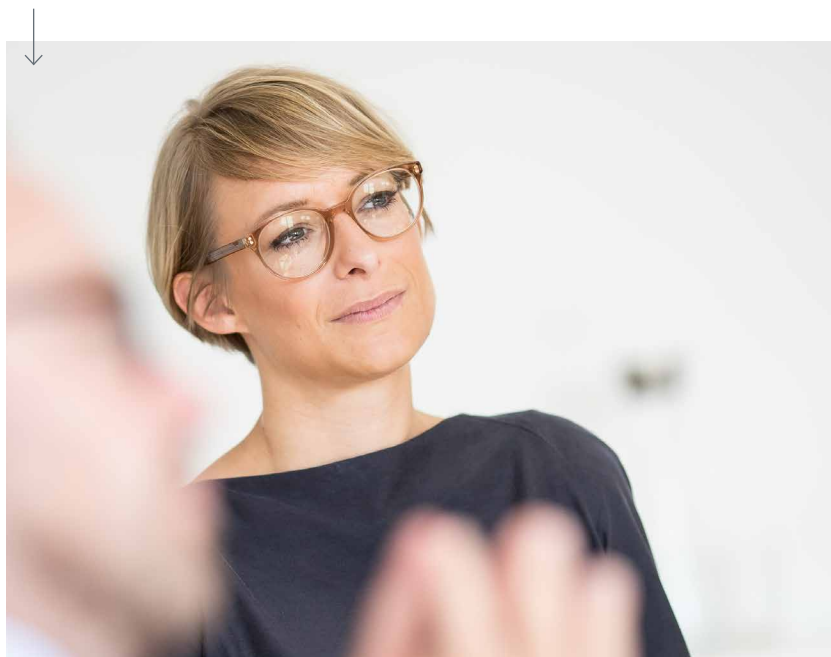
**Dr Georg Klose**

Prognos Head of Digital Development since 2002  
Geographer, Economist and Digitalisation Expert, Berlin

” **We're all about facts.** Together with my colleagues, I inform the public about the results of our work. With good reason our studies are considered reliable, independent sources. As a result, they not only make it into the daily press, but also stand up to public debate in the long-term, frequently cited by media and politicians years after being published. Especially in supposedly postfactual times I appreciate this very much.

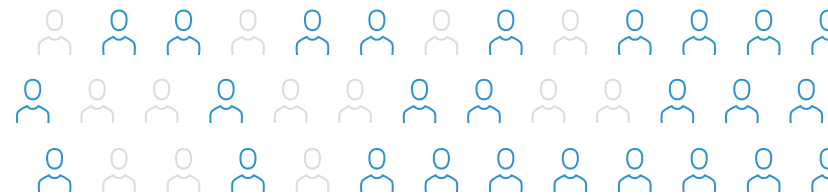
**Felizitas Janzen**

Prognos Corporate Communications Director since 2014  
Political and Communications Scientist, Berlin



# THE EXAMPLE OF SKILLS SHORTAGE: A PROGNOS BECOMES REALITY

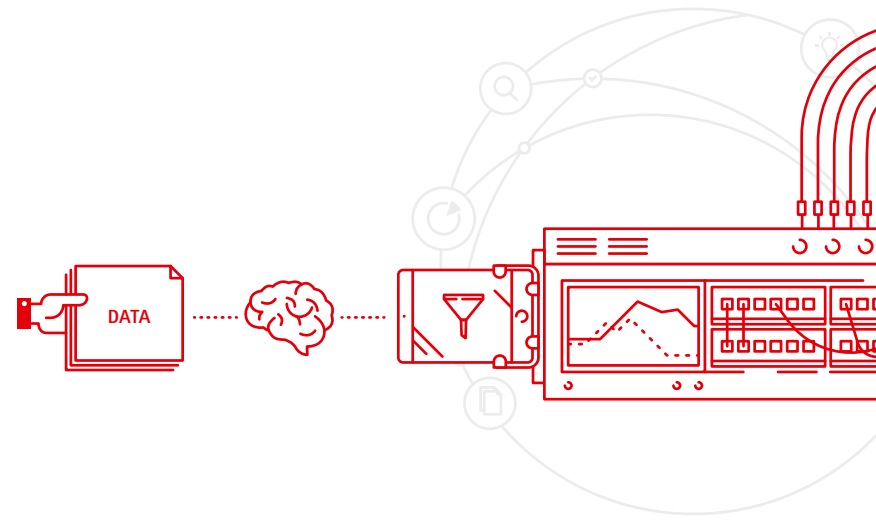
It's the year 2006. All of Germany is talking about the country's twelve-percent unemployment rate and dramatic joblessness among German youth. But, more and more, almost unknown term keeps popping up: shortage of skilled labour. Prognos' 2006 Deutschland Report warns that Germany should be worrying about its next generation of skilled professionals. Are those guys in Basel not reading the headlines? many people asked. We have more pressing issues in Germany – a fair number of politicians would probably have thought.



Eight years down the line, it becomes clear that the Prognos prediction was right. In 2014, Germany is a different country entirely. Everywhere you look people are searching for employees with expertise and better qualifications. The lack of skilled labour has become a reality – a search for the German term *Fachkräftemangel* on Google yields almost 1.5 million hits. Decision-makers in business and politics are increasingly calling for immigration rules to be further loosened to attract foreign specialists and for Germany's existing workforce to receive additional training.

In 2016, Prognos issues another warning. If nothing is done, Germany will be desperately trying to find more than three million skilled professionals in the decades to come. Politicians and business leaders have been put on notice. But will they act? \_

# WE PROVIDE ORIENTATION – WITH PROGNoses AND SCENARIOS



How many caregivers will Germany lack – with and without increased immigration?

What will happen to the Eurozone if the Chinese economy grows more or less than expected?

How much energy will private households consume in the year 2030 – with and without a new tax on carbon dioxide emissions?

What will my region look like if the exodus from the country to the city continues, and what can I do about it?

These are some of the questions planners and decision-makers have put to Prognos.

On the basis of tested economic models with a strong technical background, depending on subject area, we investigate middle- to long-term business and political developments. In so doing, we allow you to get to know the future and show your organisation what may be coming in the next five to twenty-five years.

Along with economic indicators, we examine changes in commercial and political environments, analyse the effects on relevant targeted segments and identify the areas in which you can shape your future.

Use our forecasts and scenarios for your own strategic planning, see opportunities earlier than others, warn politicians and the public of imminent developments which may be undesirable. In short: identify future developments and act in a timely manner. \_

## THE STRENGTHS OF OUR MODELLING WORK

### **Experienced.**

Over 40 years of modelling have made our models and prognoses what they are today. Oftentimes, our models have to stand the test of competition with those from academia and consultants.

### **Connected.**

Partial models can be combined depending on the questions to be answered, revealing confluences and overarching, integrational aspects.

### **Empirical.**

The basis for our models is the fundamental knowledge of how the segment in question and its dynamics function.

### **Tested.**

For many years, we have employed models to deal with recurring questions. As a result, we can review results retrospectively and enhance the precision of our models.

### **Solid.**

We map the interactions and dynamics of respective segments with fundamentally sound arguments and confirm them with sensitivity calculations.

### **Flexible.**

New questions call for new research methods. Our models are largely modular and can be adapted and expanded to meet the needs of specific inquiries.



# DOES PROGNOSES HAVE A TEAM OF FORTUNE TELLERS?



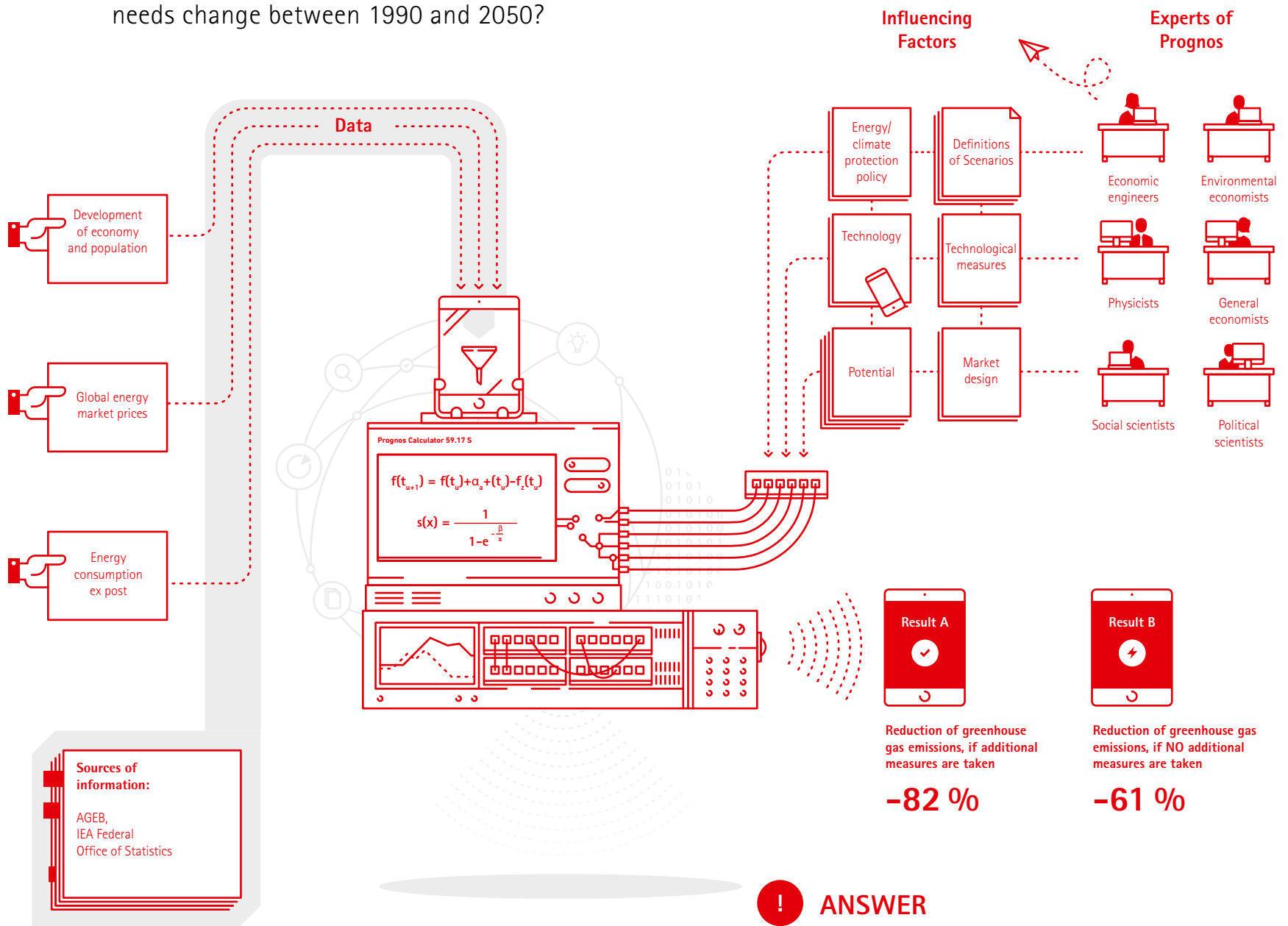
How do they come up with their long-term studies? Do they roll dice? Use crystal balls? Or consult an oracle?

No. Our experts from a variety of disciplines arrive at credible results using dynamic models, reliable data input and knowledge of the complex interactions of a variety of influencing factors. Those results are then contextualised and interpreted.

This graphic shows – in stylised and greatly simplified form – how one such abstract calculation comes about. As an example, let's take the question of how greenhouse gas emission will develop in the long term. \_

## ? QUESTION

How will the levels of greenhouse gas emissions caused by German energy needs change between 1990 and 2050?



## ! ANSWER

Without additional measures, the emissions of energy-related greenhouse gases in Germany will be reduced by 61 per cent between 1990 and 2050.

## CENTRAL HEADQUARTERS

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