



# SECURITY OF SUPPLY IN A POST-COVID-19 WORLD

Towards a new normal



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Security of supply refers to society's ability to maintain the basic economic functions required for ensuring people's livelihood, the overall functioning and safety of society, and the material preconditions for military defence in serious disruptions and emergencies.

The National Emergency Supply Agency (NESA) is an organisation operating under the Ministry of Economic Affairs and Employment. It is tasked with planning and measures related to developing and maintaining security of supply.

The National Emergency Supply Agency operates in conjunction with the National Emergency Supply Council as well as individual sectors and pools that operate as permanent cooperation bodies. Together they form the National Emergency Supply Organisation.

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*This report provides some background on the scenario planning that the National Emergency Supply Agency is carrying out to map the permanent changes caused by the coronavirus crisis and Finland's ability to adapt to them. The results of this scenario planning will be published in 2020 in a report that will include four alternative depictions of a post-COVID-19 'new normal' and examine the needs for change that these scenarios impose on security of supply work.*



# SECURITY OF SUPPLY IN A POST-COVID-19 WORLD TOWARDS A NEW NORMAL

The novel coronavirus (SARS-CoV-2) that triggered the ongoing global COVID-19 pandemic has proven to be a wicked problem. Originating in the city of Wuhan in China at the start of the year, the epidemic soon progressed into a worldwide pandemic despite China quickly implementing extensive restrictions to contain it. The World Health Organization (WHO) declared the coronavirus outbreak a pandemic on 11 March 2020. By 8 October 2020 in the autumn, approximately half a year later, the pandemic had become staggering in scope; over 32 million infections and over a million deaths<sup>1</sup>.

COVID-19 is not the first pandemic that the world has faced, but it has been over a decade since the last time that a rapidly spreading pandemic this dangerous to human health occurred. Previous pandemics that occurred in 20th and 21st centuries include the Spanish flu (1918–20), avian influenza (1997), SARS (2003) and swine influenza (2009). Nor can COVID-19 be considered a ‘black swan,’<sup>2</sup> as the eventual occurrence of a new pandemic was generally expected. For example, a report published in December 2019 by the *Global Preparedness Monitoring Board* formed by the World Health Organization and the World Bank warned of the inadequacy of pandemic preparedness and the dangers of a rapidly spreading, lethal respiratory pathogen pandemic.<sup>3</sup> Yet despite such warnings, COVID-19 caught nearly all of humanity by surprise, with preparedness in spring 2020 being clearly inadequate both globally and in Finland.

The ongoing coronavirus crisis triggered by the pandemic has so far had only relatively minor impacts on the security of supply of Finland, except in the logistics, health care and food supply sectors. Since Finland’s security of supply is based on a functioning market, there has been a pronounced need since the spring to monitor the operational capability of sectors considered critical to security of supply and the cascading effects between them, and identify the need for potential special measures for ensuring security of supply. The National Emergency Supply Organisation has responded to this need by maintaining a common situational picture since March, which involves the organisation’s sector-specific pools collecting observations from their respective sectors and submitting them to the National Emergency Supply Agency, which uses them to compile an overview of the situation and produce common situational picture reports for different branches of Government and the National Emergency Supply Organisation itself. While these situational pictures focus on short-term, immediate, industry- and sector-specific observations, the National Emergency Supply Agency’s Planning and Analysis Department has also produced analysis products for bridging the gap between situational picture and situational awareness. The situational picture data has been used to compile situational picture maps that summarise monthly observations related to the coronavirus crisis and identify the common impacts reported in different sectors. In addition to this, the National Emergency Supply Organisation has worked together with different sectors to map the cooperation carried out between sectors, i.e. interactions between individual sectors, and related observed and expected disruptions.

It is important to monitor the progress and impacts of the coronavirus crisis so that we can learn from it. However, lessons learned alone will not guarantee a more effective crisis response the future, as crises rarely repeat. Because of this, the main goal of preparedness planning is to look to the future instead of the past. It should also be noted that COVID-19 is not just a health crisis, but an economic one as well, in addition to which it has also been recognised as having social, environmental and legal dimensions, amongst others, and the capacity to effect permanent global change. This raises the question “What will the world look like after the coronavirus crisis and how well can its development trends be identified and assessed?” Providing answers to this question is challenging, as the coronavirus crisis came as a surprise despite preparedness planning efforts, resulting in an increase in uncertainty. This only goes to show that preparedness planning needs to be supported by foresight activities and data, now more than ever.

It is from these starting points that the National Emergency Supply Agency will be carrying out scenario planning in autumn 2020 with the aim of examining the changes relevant to security of supply caused by the coronavirus crisis in both the general operating environment and especially in functions considered critical to security of supply. The planning will be conducted by the Planning and Analysis Department and result in four different scenarios of a post-COVID-19 future and recommendations based on the scenarios for the development of security of supply operations during the post-COVID-19 ‘new normal.’

1. <https://coronavirus.jhu.edu/map.html>
2. Nassim Nicholas Taleb, the creator of the concept of ‘black swans,’ stated in an interview with *The New Yorker* on 21 April that he was irritated that the COVID-19 pandemic was being referred to as a ‘black swan,’ <https://www.newyorker.com/news/daily-comment/the-pandemic-isnt-a-black-swan-but-a-portent-of-a-more-fragile-global-system>
3. [https://apps.who.int/gpmb/assets/annual\\_report/GPMB\\_Annual\\_Report\\_English.pdf](https://apps.who.int/gpmb/assets/annual_report/GPMB_Annual_Report_English.pdf)

# 1. THE WORLD AFTER THE COVID-19 CRISIS – WHAT WE KNOW ABOUT IT SO FAR

Efforts to map the impacts of the coronavirus crisis began immediately in spring 2020. While the impacts and the restrictions imposed to mitigate them have been immediate, not all of them will necessarily result in permanent changes. However, it is vital that we predict and identify these permanent impacts and changes so that the post-coronavirus new normal of Finland and Finnish society can be established as quickly as possible. As society changes, security of supply must also be developed while adapting to these changes. With this in mind, it is important in terms of security of supply to focus on identifying permanent changes and paying attention to the ones that have significant impacts on the security of supply of Finland and the organisation of security of supply work.

Even if the coronavirus crisis were to subside in the next few months, or even weeks, returning to the normal preceding the crisis is no longer possible, nor desirable. This is because of the pressures for change caused by the crisis, which we can see in the international operating environment, society, business and the value chains of critical materials, products and services. Although we cannot predict the future, the broad utilisation of scenario planning in foresight can reduce the uncertainty related to the future and produce alternative futures to support preparedness planning.

## 1.1 Ongoing foresight work on the ‘new normal’ around the world

The work towards producing foresight of the post-pandemic new normal has already started around the world, with reports approaching the subject from different perspectives being published at an increasing pace. Although these reports differ from one another in terms of their objectives and approaches, they are all steered by the same underlying assumption: we will not be returning to the old normal, and all information that increases our understanding of the nature and scale of the ‘new normal’ is critical for more proactive and effective preparedness planning.

The International Monetary Fund (IMF) predicts that the global economy will contract by three per cent in 2020, which would mean the most severe global economic recession since the 1930s’ Great Depression<sup>4</sup>. At the same time, the European Commission has projected that the economy of the EU will contract by eight per cent and assessed the crisis as having affected the economies of individual member states in notably different ways<sup>5</sup>. The Bank of Finland, meanwhile, has published a forecast predicting that the economy of Finland will contract by seven per cent in 2020 due to the coronavirus, though it also emphasised that the forecast contains an exceptional degree of uncertainty.<sup>6</sup>

An analysis of the economic impacts of the coronavirus published by the United Nations Industrial Development Organization (UNIDO) reveals that industrial manufacturing volumes and export and import trade volumes have declined significantly since the spring. The analysis also indicates that there are hardly any industries in any sector that stand out as having managed to avoid the impacts of the coronavirus better than others, and that the impacts are largely the same on both industrialised and developing countries. According to the UNIDO analysis, the most notable coronavirus-related problems reported by companies are related to **the payment of employees’ wages, a decrease in demand, disruptions in value and logistics chains and financing, for example**<sup>7</sup>.

In the summer of 2020, Boston Consulting Group (BCG), one of the world’s leading consulting companies, surveyed over a hundred global companies and their operations in China, which is ahead of the rest of the world in terms of the progress of the coronavirus crisis. The aim was to survey the measures that companies have taken in response to the coronavirus crisis and its impacts. The first observation was that companies have reviewed their manufacturing and supply chains with the aim of **identifying alternative supply networks, new suppliers and distribution channels**. The second observation was that companies have **stabilised their costs, cash and liquidity with the aim of more flexibly responding to rapidly changing market situations in the future**. The third observation had to do with employees and working conditions: companies have invested in

4. <https://www.imf.org/en/News/Articles/2020/03/23/pr2098-imf-managing-director-statement-following-a-g20-ministerial-call-on-the-coronavirus-emergency>

5. [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_1269](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1269)

6. <https://www.suomenpankki.fi/en/media-and-publications/releases/2020/finlands-economy-will-gradually-recover-from-the-great-lockdown/>

7. <https://www.unido.org/stories/coronavirus-economic-impact-10-july-2020>



permanent solutions for facilitating remote work and remote group work, as a return to the pre-crisis model of working is not considered realistic. The fourth observation had to do with the mapping of new business opportunities with the aim of balancing losses in areas where demand has permanently decreased. These efforts have led **to new partnerships, especially between public sector and societal operators**<sup>8</sup>.

In June, Gartner, another international company specialising in the ICT industry, published their insights on work trends in a post-COVID-19 world. These trends included **an increase in remote working, an expansion of data collection related to monitoring work, an expansion in the use of contingent workers, an expansion of the employer's role as a social safety net, the separation of critical skills and roles and a transition from designing for efficiency to designing for resilience**. In addition to these, Gartner posits that **organisations will strive to differentiate their operating models instead of harmonising them, which will support their ability to continue operating during disruptions and prevent disruptions from spreading within the organisation**<sup>9</sup>.

In addition to Boston Consulting Group and Gartner, other global consulting companies (EY, McKinsey, KPMG, PWC) also predict major and perhaps permanent changes in the operating environments of companies, and highlight **foresight, resilience, supply chain continuity and the capacity to innovate** as some of the essential prerequisites for operating during the pandemic and the subsequent 'new normal.'

The Global Preparedness Monitoring Board (GPMB), which warned about the inadequacy of pandemic preparedness in 2019, states in its most recent report, entitled *A World in Disorder*<sup>10</sup>, that preparedness and response to crises are still inadequate and calls for urgent action to remedy the situation. The GPMB emphasises the importance of political leadership and prioritising the safety of the population in decision-making. Preparedness planning is not limited to what a country does for its citizens, with citizens' own activity in protecting themselves and others also becoming increasingly important. According to the GPMB, the impacts of the pandemic are not limited to health; COVID-19 will be remembered not only for its high mortality, but for its rapid spread and long-term socio-economic consequences as well. **Preparedness is not currently proactive enough, as it is focused excessively on reactive measures, the effectiveness of which is not being sufficiently reviewed**. Preparedness

8. <https://www.bcg.com/featured-insights/coronavirus>

9. <https://www.gartner.com/smarterwithgartner/9-future-of-work-trends-post-covid-19/>

10. [https://apps.who.int/gpmb/assets/annual\\_report/GPMB\\_AR\\_2020\\_EN.pdf](https://apps.who.int/gpmb/assets/annual_report/GPMB_AR_2020_EN.pdf)

investments are also considered to be too low. The report also goes on to point out that none are safe until all are safe. In situations similar to the ongoing pandemic, national preparedness alone is not enough; we also need to engage in more long-term international cooperation.

In June, the RAND Corporation published a report on the Strategic National Stockpile of the United States and its capacity to respond to the COVID-19 pandemic. Entitled *The Strategic National Stockpile and COVID-19: Rethinking the Stockpile*, the report describes the lifecycle and development of the Strategic National Stockpile that has resulted in the creation of the United States' current stockpile concept, which proved unable to respond to the expectations and needs introduced by the coronavirus crisis. The report states that the federal government's response to the crisis failed utterly due to slow decision-making and the underfunding of the stockpile, among other factors. Because of this, the report calls for the critical re-examining of the system, starting from its basic assumptions. The purpose and goals of the Strategic National Stockpile have been expanded over the years through the addition of various products, but at the same time **no comprehensive assessments has been carried out on what kind of development needs these changes give rise to in terms of the administration of the stockpile**. The report also states that **the Strategic National Stockpile is but one area of overall preparedness, one that should be updated to correspond to modern needs and supported by improving supply chain continuity and the more strategic steering of domestic production, among other means**.<sup>11</sup>

## 1.2 Foresight on the 'new normal' in Finland

Statistics Finland's situation picture of the economy published in August 2020 and updated in September indicates that Finland has so far weathered the coronavirus crisis better than other European countries, thanks to our economic structure, low population density, effective health care system and high degree of digitalisation, which facilitates remote work. In the second quarter of 2020, Finland's gross domestic product declined by only 6.4%, whereas the total combined BKT of all EU countries declined by 14.1%. However, Finland is strongly connected to foreign companies via foreign trade and value chains, as a result of which it is important for Finland to monitor the economies of other countries<sup>12</sup>. According to a recent study by Statistics Finland and the OECD, there are 500,000 Finnish jobs that are either directly or indirectly dependent on exports, which decreased by 11% during the second quarter of 2020 compared to the same period last year<sup>13</sup>.

In April, the Finnish Broadcasting Company Yle interviewed five Finnish experts, asking what might happen to the economy. Professor Mika Pantzar from the National Consumer Research Centre predicts that the **global economy will become more fragmented, with smaller units and shorter production chains**, and that societies will create new firewalls for more effectively limiting the impacts of future crises. Pantzar also thinks that **self-sufficiency will become more highly valued**. Professor of World Politics Heikki Patomäki predicts that recovery measures implemented by central banks and the public sector will **increase the role of the state and the European Union** in economic regulation. This trend is also recognised by Chief Economist of Swedbank Heidi Schauman. Professor of Economics Kaisa Kotakorpi predicts that the coronavirus crisis will make **the role of the state and the public sector in the economy more visible**. Professor of Economic Sociology Pekka Räsänen's thoughts are similar to those of Kotakorpi, as Räsänen considers it likely that **the acceptance of strong state regulation will increase**<sup>14</sup>.

At the start of October 2020, Finnish Business and Policy Forum EVA and Nordic West Office published four scenarios for Finland for the period of 2020–2028. The four alternative futures prepared as a result of their scenario planning, which was carried out in collaboration with 20 different companies and communities, are entitled: Quantum Leap, Regulated Finland, Green Power and New Tribes. In the **Quantum Leap** scenario, Finland's structural issues have been addressed and the taxation of work and entrepreneurship has been lowered. Thanks to the digital leap, Finland is able to compete on the global market, performing well in the 5G market and energy industry. As a result, Finland's attractiveness increases. In the **Regulated Finland** scenario, Finland closes its borders and strives for self-sufficiency. Productivity plummets, as the utilisation of artificial intelligence, which is focused on public services, is not a viable export. In the **Green Power** scenario, the European Green Deal becomes a growth strategy for Finland, but the country's state-driven investment programme is unable to produce a leap in productivity. The public economy declines and unemployment increases. The **New Tribes** scenario describes dispersed development, which raises the Government's and companies' costs. Competition between regions produces new technological innovations that boost the economy and attract labour to Finland from abroad as well. However, Finland is strained by high national debt<sup>15</sup>.

11. <https://www.rand.org/pubs/testimonies/CTA530-1.html>

12. <http://www.stat.fi/ajk/koronavirus/koronavirus-ajankohtaista-tilastotietoa/miten-vaikutukset-nakyvat-tilastoissa/talouden-tilannekuva>

13. <https://www.stat.fi/uutinen/tilastokeskuksen-ja-oecd-yhteisraportti-suomi-vahvasti-riippuvainen-globaaleista-markkinoista>

14. <https://yle.fi/uutiset/3-11307689>

15. <https://www.eva.fi/wp-content/uploads/2020/10/eva-raportti-lastuna-lainehilla.pdf>

# 2. ALTERNATIVE ‘NEW NORMALS’ – PRELIMINARY THOUGHTS ABOUT THE SCENARIOS

As detailed in the sections above, the societal change brought about by the coronavirus crisis is inevitable, though there is a still a great deal of uncertainty as to its exact nature. Since it is predicted that the crisis will cause permanent changes to the economy, trading and global and national networks in particular, these changes and adaptation thereto should be taken into account in national preparedness planning. Security of supply work, too, must adapt to the changes in society.

Foresight offers a way of forming a better picture of how security of supply should adapt in the future. While foresight does not provide certain answers, it does help reduce uncertainty in long-term planning. Instead of relying on a traditional operating model based on lessons learned from past crises, we should focus on predictive and proactive preparedness. After all, the next crisis might not be a pandemic. It should be noted, however, that not all crises can be predicted, nor can we prepare for every possible threat. What is needed, therefore, is a growing investment in resilience, the aim of which is not to make society perfectly safe, but to develop society’s ability to predict and survive crises that cannot be completely prevented in our networked world. Resilience responds to the increasing complexity of society with agility and adaptability, which may become the keys to success as we transition to the new normal as well.



The National Emergency Supply Agency has previously assessed the threats and opportunities posed by global changes to sectors considered vital to security of supply in its Security of Supply Scenarios projects, the most recent of which was carried out in 2017<sup>16</sup>. However, the national and international observations made about the coronavirus crisis and its predicted permanent impacts highlight several driving forces relevant to security of supply that require special examination. These driving forces include:

- the balancing or choice between self-sufficiency and international cooperation
- the relationship between and roles associated with material preparedness and continuity management
- changes in and fragmentation of global value chains
- the strengthening and crisis-orientation of power politics
- blocification
- the role of technology and digitalisation
- the post-truth world

In addition to the driving forces paving the way to a post-COVID-19 world, we can also already identify several national-level lessons learned about the handling of the coronavirus crisis that should be utilised to develop national preparedness and that may affect the organisation of security of supply work as well. These include:

- a clearer division of responsibilities between public sector branches and the practising of cooperation for the purpose of ensuring smooth operation
- the re-examination of the cooperation and shared responsibility approach of the overall safety model
- the relationship between political steering and decision-making based on expert knowledge during severe disruptions and exceptional circumstances
- taking regional preparedness into account in health and social services and regional government reforms
- the development of operational picture collection, production and distribution
- speeding up decision-making and related communications
- re-examining the material preparedness system in relations to societal changes and setting targets for material stockpiles
- international cooperation related to preparedness
- the suitability of the state aid system for the urgent funding of businesses
- the development of completely new preparedness models, especially ones that are effective in various crises.

To summarise, the scenario planning being carried out to examine the post-COVID-19 new normal and security of supply focuses on describing alternative ways in which the world will permanently change as a result of the coronavirus crisis. In addition to describing scenarios, the aim is to assess what kind of needs for change these alternative futures would bring with them in terms of security of supply and what kind of decisions they would impose on the preparedness and security of supply of Finland. The scenario planning will be carried out utilising international publications related to the economy, foresight, preparedness and the coronavirus crisis. In addition to these, scenario planning will make use of the National Emergency Supply Organisation's insights on changes occurring in different sectors and the economy, which will be formed based on a survey and interviews. The report on the scenarios and their impacts on security of supply will be published in December 2020.

16. [https://cdn.huoltovarmuuskeskus.fi/app/uploads/2018/10/23143222/Skenaariot-2030\\_2p.pdf](https://cdn.huoltovarmuuskeskus.fi/app/uploads/2018/10/23143222/Skenaariot-2030_2p.pdf)

# SOURCE MATERIAL

Publications taken into account in the background report and scenario planning:

Publisher	Title	Main themes	Date of publication	Link
IMF- Finance & Development	Life Post-COVID-19	The economy	June 2020	<a href="https://www.imf.org/external/pubs/ft/fandd/2020/06/how-will-the-world-be-different-after-COVID-19.htm">https://www.imf.org/external/pubs/ft/fandd/2020/06/how-will-the-world-be-different-after-COVID-19.htm</a>
World Bank	The Global Economic Outlook During the COVID-19 Pandemic: A Changed World	The economy	8 June 2020	<a href="https://www.worldbank.org/en/news/feature/2020/06/08/the-global-economic-outlook-during-the-covid-19-pandemic-a-changed-world">https://www.worldbank.org/en/news/feature/2020/06/08/the-global-economic-outlook-during-the-covid-19-pandemic-a-changed-world</a>
OECD, STAT	Globalisation in Finland: Granular insights into the impact on businesses and employment	The economy	11 June 2020	<a href="http://www.stat.fi/tup/julkaisut/tiedostot/julkaisuluettelo/ykau_202000_2020_23449_net.pdf">http://www.stat.fi/tup/julkaisut/tiedostot/julkaisuluettelo/ykau_202000_2020_23449_net.pdf</a>
EVA	Lastuna lainehilla- Suomi-skenaariot 2020-2028	The economy	7 October 2020	<a href="https://www.eva.fi/wp-content/uploads/2020/10/eva-raportti-lastuna-lainehilla.pdf">https://www.eva.fi/wp-content/uploads/2020/10/eva-raportti-lastuna-lainehilla.pdf</a>
RAND	The Strategic National Stockpile and Covid-19: Rethinking the stockpile	Preparedness	24 June 2020	<a href="https://www.rand.org/pubs/testimonies/CTA530-1.html">https://www.rand.org/pubs/testimonies/CTA530-1.html</a>
IMD	Scenario planning for a post-Covid-19 world: make sure you are prepared for the new normal	Foresight	May 2020	<a href="https://www.imd.org/research-knowledge/reports/scenario-planning-for-a-post-covid-19-world/">https://www.imd.org/research-knowledge/reports/scenario-planning-for-a-post-covid-19-world/</a>
Geneva Centre for Security Policy (GCSP)	Resilience and Agility: Managing and Mitigating Evolving Threats in a Hyper-Connected World	Foresight, resilience	August 2020	<a href="https://dam.gcsp.ch/files/doc/resilience-and-agility-managing-and-mitigating-evolving-threats-in-a-hyperconnected-world">https://dam.gcsp.ch/files/doc/resilience-and-agility-managing-and-mitigating-evolving-threats-in-a-hyperconnected-world</a>
Atlantic Council	What world post- COVID-19? Three scenarios	Foresight, geopolitics	7 July 2020	<a href="https://www.atlanticcouncil.org/content-series/shaping-post-covid-world-together/what-world-post-covid-19-three-scenarios/">https://www.atlanticcouncil.org/content-series/shaping-post-covid-world-together/what-world-post-covid-19-three-scenarios/</a>
PWC	Beyond COVID-19: Five key strategic priorities for a post-crisis world	The economy	4 May 2020	<a href="https://www.pwc.com/gx/en/financial-services/assets/pdf/pwc-beyond-covid-19.pdf">https://www.pwc.com/gx/en/financial-services/assets/pdf/pwc-beyond-covid-19.pdf</a>
Deloitte, Salesforce	The world remade by COVID-19: Planning scenarios for resilient leaders	Foresight, the economy	6 April 2020	<a href="https://www2.deloitte.com/global/en/pages/about-deloitte/articles/covid-19/covid-19-scenarios-and-impacts-for-business-and-society-world-remade.html">https://www2.deloitte.com/global/en/pages/about-deloitte/articles/covid-19/covid-19-scenarios-and-impacts-for-business-and-society-world-remade.html</a>
OECD	Strategic foresight for the COVID-19 crisis and beyond: Using futures thinking to design better public policies	Foresight, public decision-making	10 June 2020	<a href="https://read.oecd-ilibrary.org/view/?ref=134_134395-2n53o8sh0y&amp;title=Strategic-foresight-for-the-COVID-19-crisis-and-beyond-Using-futures-thinking-to-design-better-public-policies">https://read.oecd-ilibrary.org/view/?ref=134_134395-2n53o8sh0y&amp;title=Strategic-foresight-for-the-COVID-19-crisis-and-beyond-Using-futures-thinking-to-design-better-public-policies</a>
Global Risks Advisory Board of the World Economic Forum's Global Risks Initiative	Challenges and Opportunities in the Post-COVID-19 World	Foresight	May 2020	<a href="http://www3.weforum.org/docs/WEF_Challenges_and_Opportunities_Post_COVID_19.pdf">http://www3.weforum.org/docs/WEF_Challenges_and_Opportunities_Post_COVID_19.pdf</a>



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