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Scenario planning with a sociological eye: Augmenting the intuitive logics approach to understanding the Future of Scotland and the UK

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ABSTRACT

This paper draws on a social theory-informed understanding of causality to illustrate how notions of agent–structure interactions can enhance the intuitive logics (IL) approach to scenario planning. It incorporates concepts such as the ‘subjective’ predispositions of agency, ‘objective’ structures of social systems, activity dependence, unintended consequences of action and event-time temporality in the IL method to augment causal analysis in the scenario development process. The paper illustrates the social theory-informed IL framework through its application to a scenario exercise undertaken in the lead-up to the Scottish referendum on independence from the United Kingdom on September 18th, 2014. The central thesis of the paper is that agent–structure interactions underpin the unfolding of futures in social systems by both constraining and enabling the range of possible futures that can emerge

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1. Introduction

Scenario planning has become a widely used method for generating strategic insights in the public, private and non-for-profit sectors in recent years (Durance and Godet, 2010; Gunn and Williams, 2007; Wright et al., 2013). Its widespread use in strategic planning processes can be attributed to the increasing complexity, interconnectedness and uncertainty that characterizes business and policy-making environments. While a range of approaches to scenario planning exist, the intuitive logics (IL) approach and its derivatives has been identified as the most commonly adopted method (Bradfield et al., 2005; Postma and Liebl, 2005; van Notten et al., 2003; Varum and Melo, 2010). The IL approach rests on the premise that by developing a range of plausible stories about how the future could evolve (e.g. Van der Heijden, 2005; Schoemaker, 1993; Schwartz, 1991; Wack, 1985a,b), they can improve perception by challenging assumptions and changing mindsets, and lead to better strategic decisions through an enhanced understanding of how the future might unfold (Tapinos, 2011; O'Brien and Meadows, 2013; Wright et al., 2013). Its success as a strategic planning tool can be attributed, at least in part, to accounts of its successful use by Royal/Dutch Shell (RDS), the global oil and gas giant, in navigating the oil and

gas shocks of the 1970s and 1980s (e.g. Wack, 1985a,b; Schwartz, 1991; Schoemaker, 1993; Van der Heijden, 2005).

Despite its increasing popularity as an approach for making sense of an uncertain future and for strategic decision-making support, scholars have sought to augment its capabilities and effectiveness (Derbyshire and Wright, in press). This has been partly in response to criticisms that scenarios might not always have the sort of impact on changing mindsets or influencing strategic decision-making that advocates of scenario planning purport (e.g. Hodgkinson and Wright, 2002; MacKay and McKiernan, 2010; O'Brien and Meadows, 2013). Some scholars have, for instance, postulated that the ‘cause–effect’ nature of the IL approach is overly deterministic and can fail to prepare individuals and/or organizations for surprising futures (e.g. Burt, 2007; Derbyshire and Wright, 2014, in press). Linear cause–effect approaches to IL privilege the direct agency, or efficacy of one process (the cause) with another process (the effect). This is most evident in the identification and separation of forces shaping the future into those that are ‘predetermined’ from those that are ‘uncertain’ and the widespread use of influence diagrams in IL scenario approaches (e.g. van der Heijden, 2005; Van der Heijden et al., 2002; Wack, 1985a,b). In social systems, we argue in this paper, analyzing causally complex patterns through agent–structure interactions is a more theoretically robust method for understanding complex causal patterns underpinning the emerging future. We base our argument on the premise that a reason for RDS’ success in the 1970s and 1980s in using the method was a profound, if tacit understanding of the socio-

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political dynamics between agents and structures underpinning the economics of the global oil and gas industry.

Despite the underlying social structures of economic systems (e.g. Bourdieu, 2005), there remains a paucity of social theory-informed methodological and theoretical development in the scenario planning field. To address this gap, we draw on a scenario exercise as an illustration of how developing scenarios with a “sociological eye” (cf. Whittington, 2007) can augment notions of causality in the IL method. By “sociological eye” we mean to build on work that has the aim of enhancing IL methods in scenario analysis by incorporating sensibilities from social theory (e.g. MacKay and Tambeau, 2013) and Platonic notions of efficient, final, formal and material causality (Derbyshire and Wright, *in press*). The scenario exercise itself was part of a wider program of research into the “Future of the UK and Scotland” by almost 40 academics from different disciplines in the lead-up to Scotland’s referendum on independence from the United Kingdom (UK) on September 18th, 2014. The study was funded by the UK’s largest funding body for university research, the Economic and Social Research Council (ESRC).

1.1. Research aims, objectives, purpose

Our paper has two primary aims and objectives that align with the overall purpose of augmenting notions of causality in the IL approach to scenario planning (e.g. Wright et al., 2015). First, we aim to draw on social theory, and particularly social theory that reconciles agent–structure interactions (e.g. Archer, 1995; Bourdieu, 1977; Giddens, 1979, 1984, 1993) with the objective of further developing the critical theoretical axioms underpinning the method. Second, we aim to couple sensibilities incorporated from social theory with notions of causality with the objective of improving scenario planning IL methods. Taken together, our aims and objectives seek to also address the paucity of work in IL approaches to scenario planning that are informed by social theory, particularly in the context of public-policy scenarios that deal with widespread societal change.

1.2. Research questions

In this paper, the primary research question we seek to address is, *how can an understanding of future uncertainties informed by social theory augment notions of causality in the intuitive logics approach to scenario planning?* In addressing this research question, we also seek to grapple with two secondary research questions including: *how notions of agency–structure interactions can usefully enhance causal assessments in the intuitive logics method?*; and, *how can different notions of the temporalization of causality be incorporated into the intuitive logics approach to scenario development?*

1.3. Research contributions

This article makes several contributions to the scenario planning field. First, it augments the IL approach to scenario planning by demonstrating that the development of causality in alternative futures with a “sociological eye” can lead to a more grounded understanding of socio-political constraints and potentialities of the range of alternative futures possible. Second, in doing so, it seeks to extend a nascent line of inquiry into the social theory axioms underpinning scenarios (e.g. Hughes, 2013; MacKay and Tambeau, 2013). And third, it also extends the small literature on scenario planning directed towards public understanding and policy-making by placing agent–structure interactions at the center of scenario analysis (cf. Cairns et al., 2016; Hughes, 2013).

1.4. Paper structure

The article begins with an overview of scenario planning generally, and the IL method specifically. To illustrate the approach, it gives a

brief overview of its development, focusing particularly on its use by RDS. The article then turns to causality in the IL literature, and elaborates on a number of concepts in social theory, such as notions of agency, objective structures, activity dependence, unintended consequences, and temporality to augment the IL approach through a systematic interrogation of causation. To illustrate how the concepts can be used, it draws on a recent scenario intervention in the run-up to the Scottish referendum on independence from the UK on the 18th of September 2014. Finally, it ends with a discussion of how such augmentations can help to develop the IL approach to scenario planning.

2. Conceptual overview

In this section, we begin by addressing what scenarios are, before turning to a brief history of the IL approach to scenario planning as developed at RDS. After reviewing recent critiques of the use of causality in IL approaches to scenario planning, the section turns to a number of concepts drawn from social theory that, we argue, can be used for augmenting notions of causality in IL approaches to scenario planning. Our particular focus is on scenario development as it pertains to public-policy and widespread societal change.

2.1. What are scenarios and what are their purpose?

While definitions of scenarios vary to the extent of “rendering it slippery” (Stout, 1998, p. 3), Kahn and Wiener (1967, p.6), who popularized the term, define them as a “hypothetical sequence of events ... for the purpose of focusing attention on causal processes and decision points”. They are not predictions, but plausible stories about how the future could evolve in uncertain and often surprising ways. Rather than assuming away uncertainties, as many forecasting techniques do, they “maintain the future as an open, but not an empty space, where facts, expectations, and perceptions intermingle” (Wilkinson and Kupers, 2014, p. 13). Drawing on a combination of analytical, creative and critical techniques, they are designed to help their users to gently ‘re-perceive’ reality (Wack, 1985a,b). Scenarios can be thought of as post-cards from the future, which describe different possibilities and potentialities that are then sent back through time to be read in the present.

As with a wide range of scenario definitions, scholars also point out that there appears to be a confusing array of reasons why organizations might engage in scenario planning (Wright et al., 2013; also see Burt and van der Heijden, 2003). Wright et al. (2013) have helpfully identified three primary purposes that the majority of scenario planning interventions are used for in the extant literature. They are to challenge conventional thinking to (i) change mind-sets and reframe perceptions within organizations, (ii) to improve decision-making within strategy development processes, and (iii) to enhance understanding of connections, causal processes and logical sequences of events that may shape the impending future. And while scenario methods are as varied as the multiplicity of definitions and purposes associated with the technique – which at times has led scholars to criticise it for ‘methodological chaos’ (cf. Varum and Melo, 2010; Whaley, 2008) – many are based on, or are a derivative of the ‘basic’ IL method (cf. Wright et al., 2013).

2.1.1. The Intuitive Logics (IL) approach to scenario planning

Successive surveys of corporate planning departments have shown consistently that scenario planning continues to increase in popularity (Linnemen and Klein, 1983; Malaska et al., 1984; Malaska, 1985; Rigby, 1993, 2003; Rigby and Bilodeau, 2005, Rigby and Bildeau, 2015). By 2001, anecdotal evidence suggested that some 70% of scenario planning methods being used for strategic planning were based on, or derivatives of the IL method (Hart and Rudman, 1999; also see Derbyshire and Wright, 2014; MacKay and McKiernan, 2010; MacKay and Parks, 2013). The Bain annual survey of management tools estimates that scenario planning is, at the time of writing, the fastest growing strategic planning tool (Rigby and Bildeau, 2015).

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