



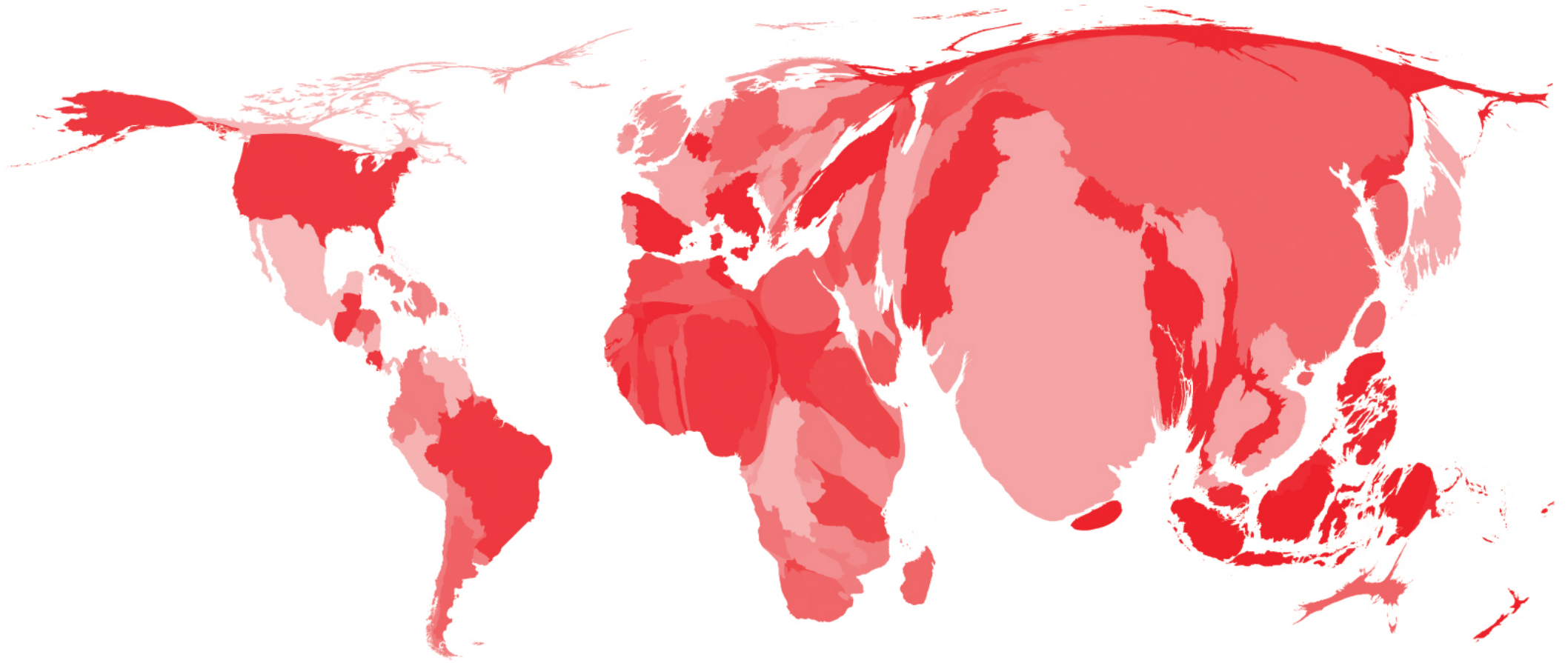
The World in 2025
Insights from Multiple Expert Discussions
25 February 2016

futureagenda
The world's leading open foresight program



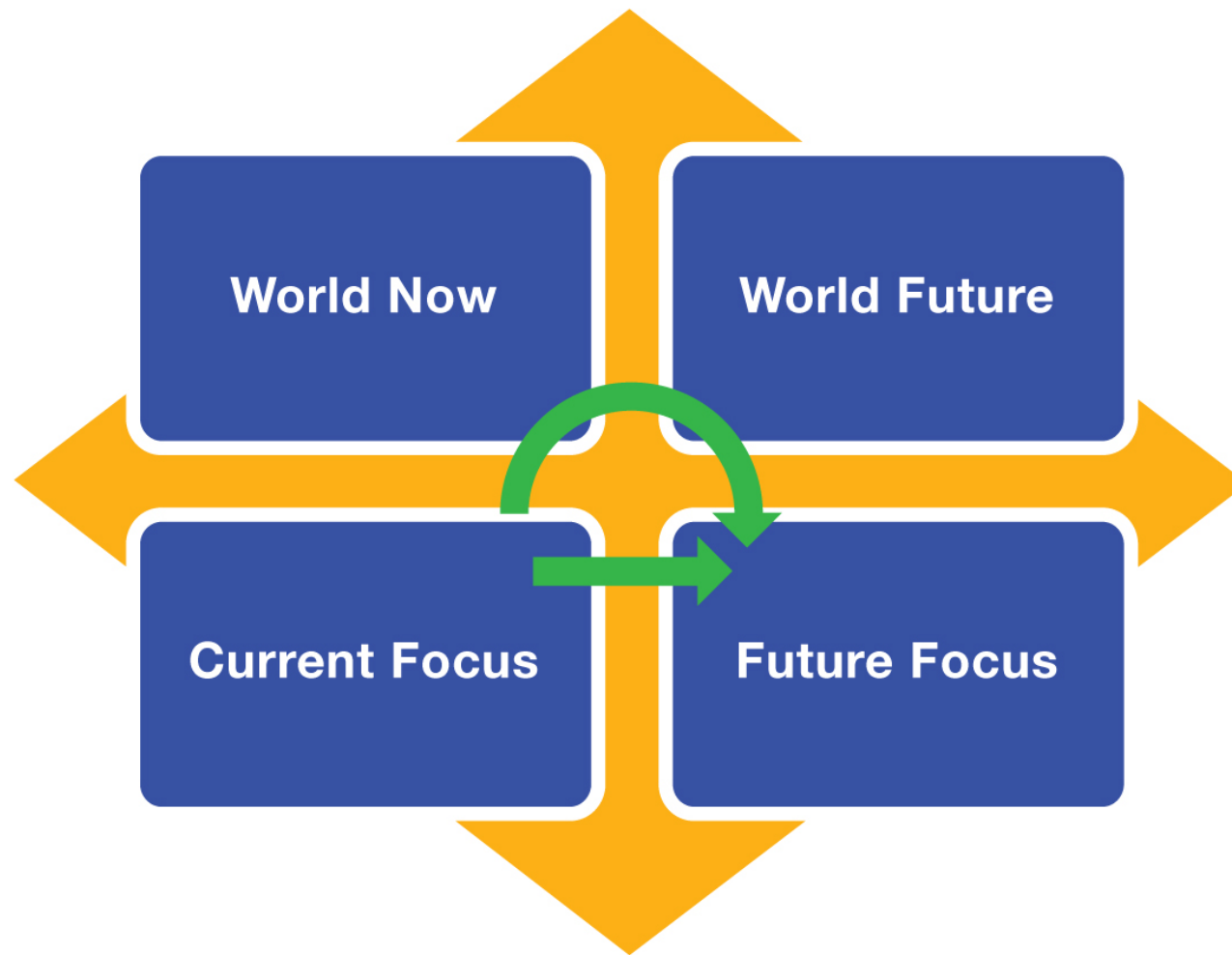
The World in 2025

This document provides a summary of what we heard from multiple expert voices around the world – on how it is changing, what is driving this change, where will be the impacts and why these may evolve over the next decade.



Future Agenda

The Future Agenda is the world's largest open foresight program that accesses multiple views of the next decade so we can all be better informed and stimulate innovation.



Looking Forwards

Organisations increasingly want to identify and understand both the anticipated and unexpected changes so that they can be better prepared for the future.



Future Agenda 1.0 Top Insights for 2020

From the 2010 program, 52 key insights on the next decade were shared widely and have been extensively used by organisations around the world. Future Agenda became the world's largest open foresight platform.

Future Agenda 1.0

1 HOST

16 TOPICS

25 COUNTRIES

50 WORKSHOPS

1500 ORGANISATIONS

Future Agenda 2.0

50 HOSTS

24 TOPICS

35 COUNTRIES

120 WORKSHOPS

5000 ORGANISATIONS



Future Agenda in Numbers

The first Future Agenda programme engaged a wide range of views in 25 countries. Future Agenda 2.0 has doubled the face-to-face interaction and significantly raised online sharing, debate and discussion.



Ageing



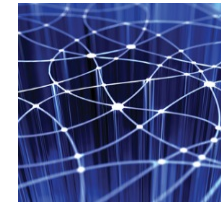
Cities



Collaboration



Company



Connectivity



Currency



Data



Education



Energy



Faith



Food



Government



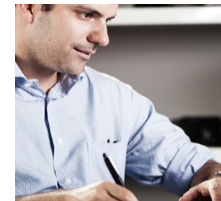
Health



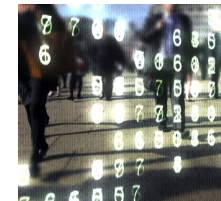
Learning



Loyalty



Payments



Privacy



Resources



Trade



Transport



Travel



Water



Wealth



Work

Future Agenda 2.0 Topics

The second version of the Future Agenda program took place during 2015 and has been addressing 24 topics via 120 events in 45 cities in 35 countries in partnership with 50 core hosts.



**The
Certainties**



**Interconnected
Systems**



**The Data
Revolution**



**Unequal
Access**



**Our
Habitat**



**Beliefs and
Belonging**



**Power and
Influence**



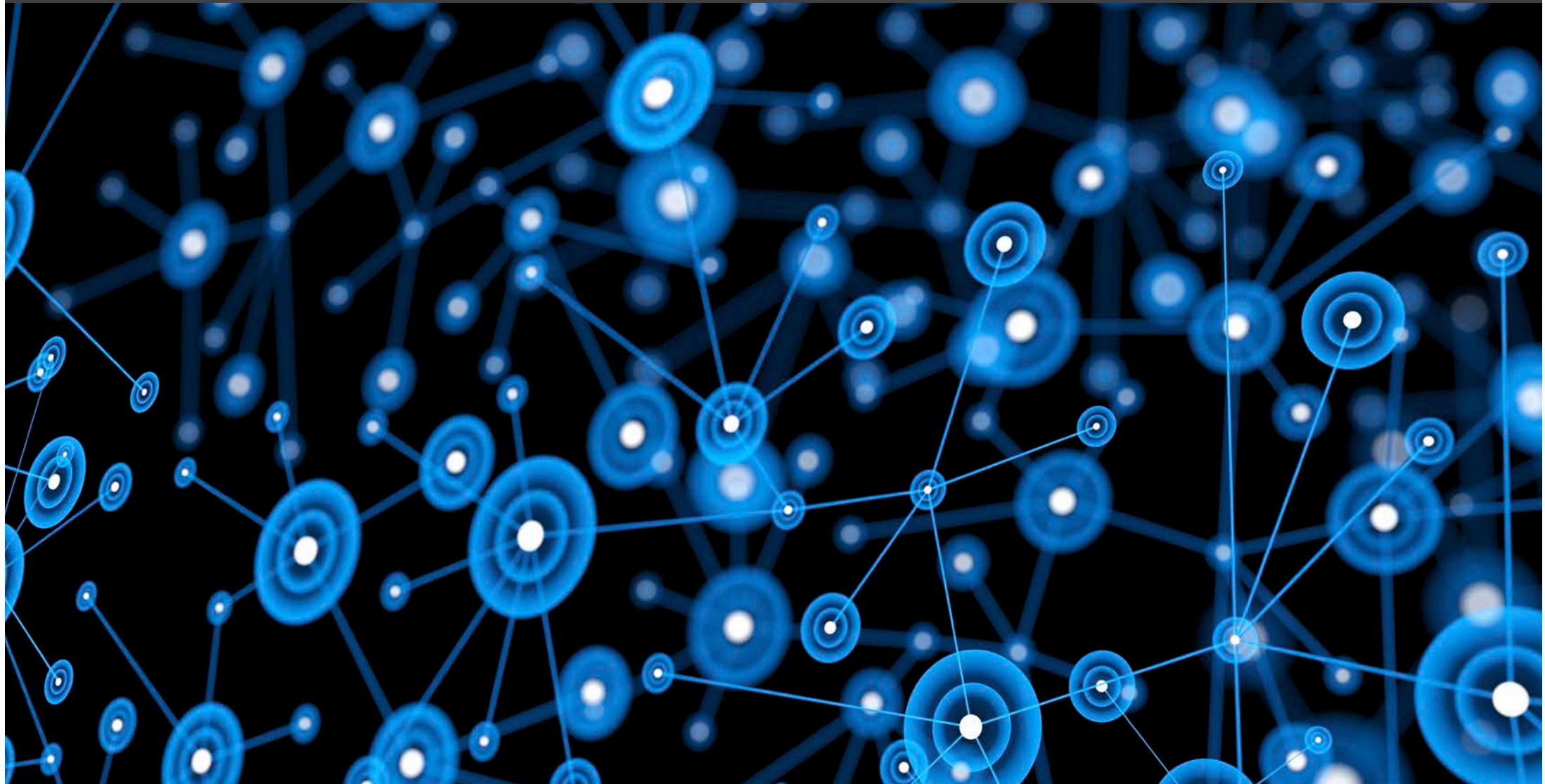
**Changing
Business**

Eight Key Themes

Across the multiple discussions, 60 emerging issues are touching upon and connecting with eight underlying, and interwoven, themes with different emphasis in different countries. These are detailed below.



The Certainties



Everything Connected

Over 1 trillion sensors are connected to multiple networks: everything that can benefit from a connection has one. We deliver 10,000x more data 100x more effectively but are concerned about the security of the information that flows.



Imbalanced Population Growth

A growing population adds another billion people but it is also rapidly ageing: a child born next year will live 6 months longer than one born today. While migration helps to rebalance, increasing dependency ratios challenge many.



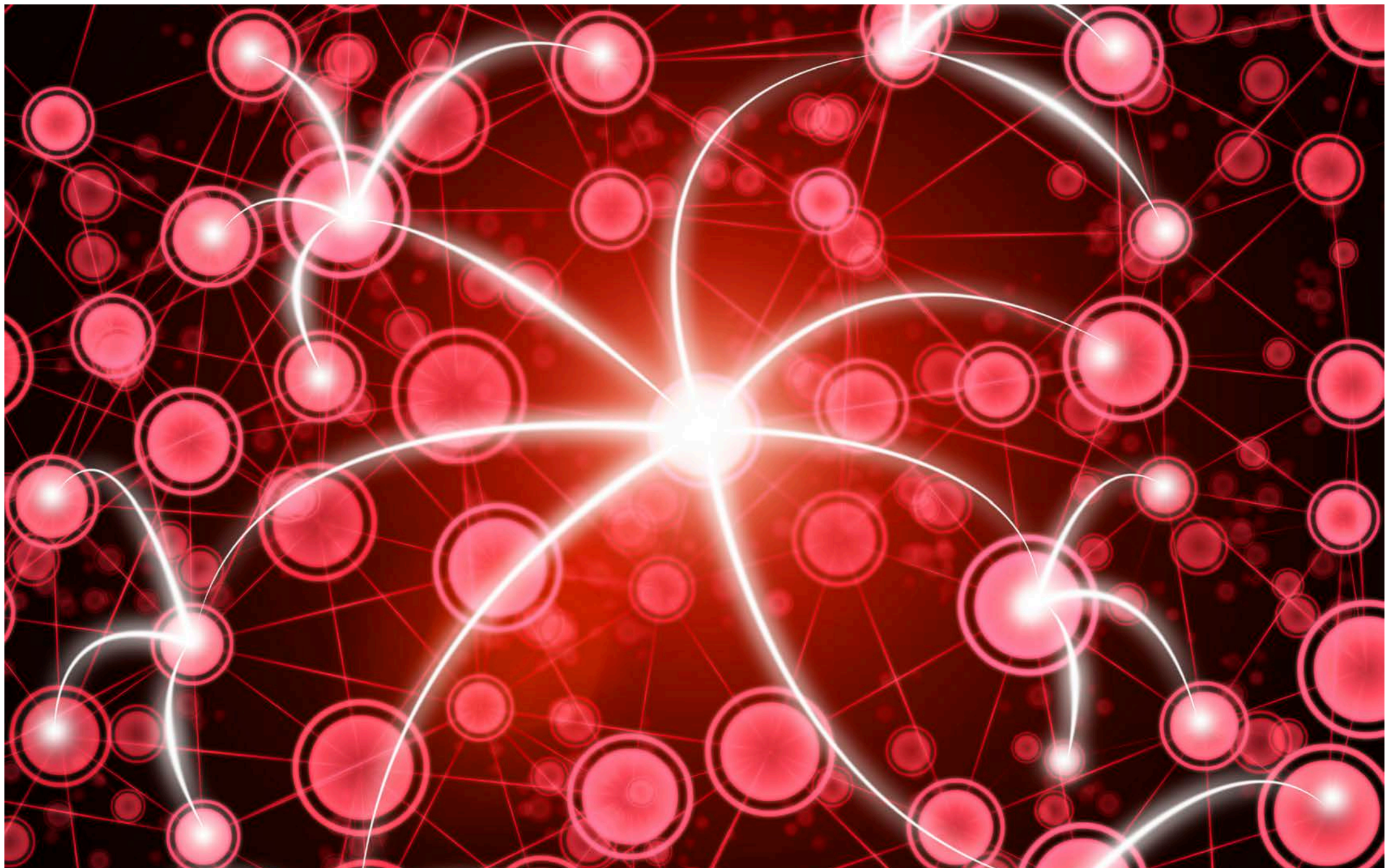
Key Resource Constraints

Economic, physical and political shortages of key resources increase and drive increasing tension between and within countries. As we exceed the Earth's natural thresholds, food and water receive as much focus as oil and gas.



Shifting Power and Influence

The centre of gravity of economic power continues shifting eastwards, back to where it was 200 years ago. Recent superpowers seek to moderate the pace of change but the realities of population and resource locations are immovable.



Interconnected Systems



Affordable Healthcare

The escalating cost of healthcare is further stressed by the need to support the old and the chronically ill. Spending 20% of GDP on healthcare is seen as unsustainable so hard decisions are taken around budgets and priorities.



Air Quality

Rising air pollution in many cities is killing people and becomes a visible catalyst for changing mind-sets and policies across health, energy, transportation and urban design.



Autonomous Vehicles

The shift to fully autonomous transport is an evolution via truck platoons on highways and small urban delivery pods. Connected cars create the network and test the technologies for the eventual revolutionary driverless experience.



Deeper Collaboration

Partnerships shift to become more dynamic, long-term, democratised, multi-party collaborations. Competitor alliances and wider public participation drive regulators to create new legal frameworks for open, empathetic collaboration.



Energy Storage

Storage, and particularly electricity storage, is the missing piece in the renewables jigsaw. If solved, it can enable truly distributed solar energy as well as accelerate the electrification of the transport industry.



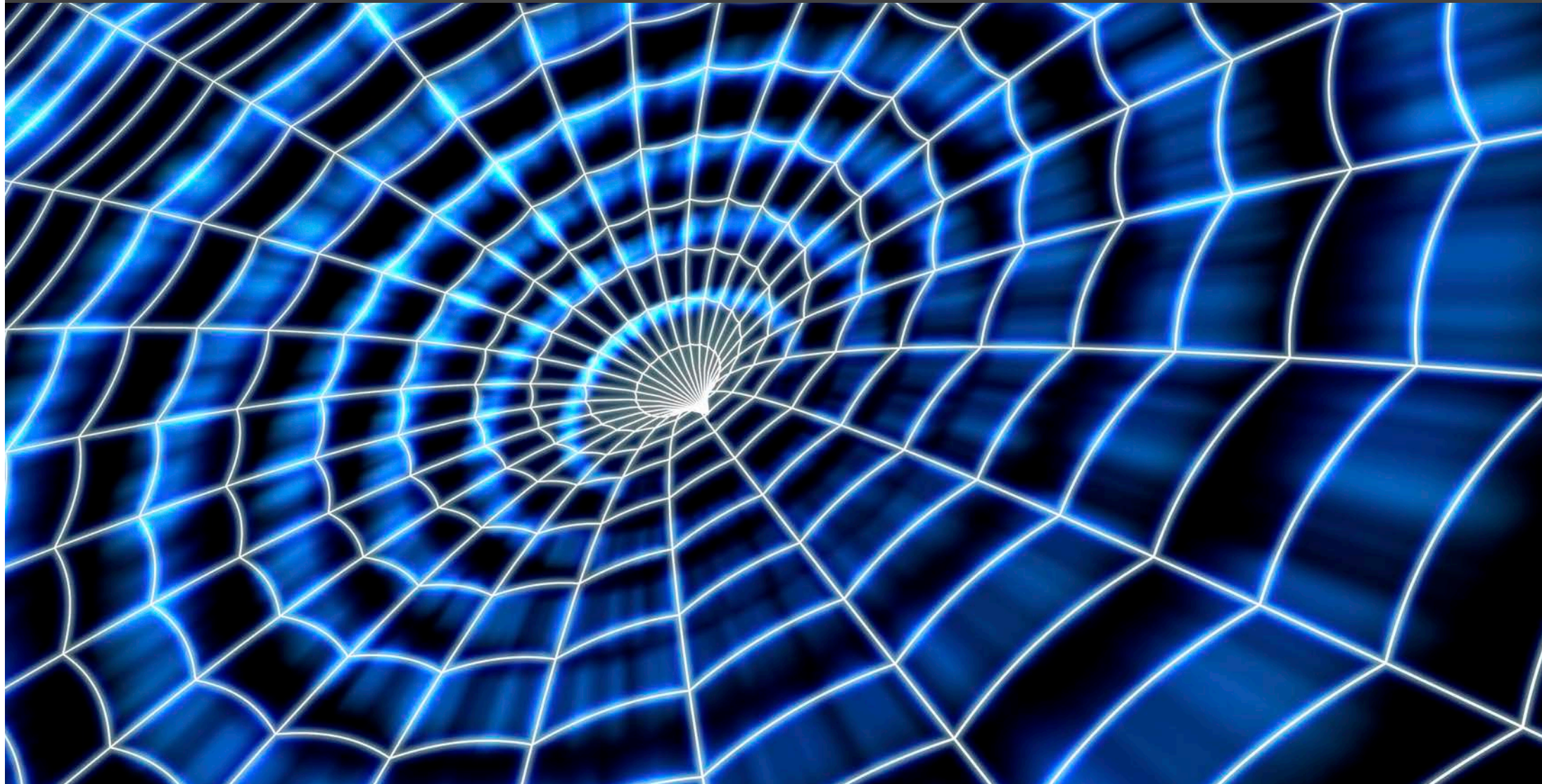
Food Waste

30-50% of our food is wasted either in the supply chain or in consumption and could feed another 3 billion. Optimising distribution and storage in developing countries and enabling better consumer information in others could solve this.



Intra City Collaboration

Increasing competition between cities overrides national boundaries and drives change. They compete to attract the best but also collaborate to avoid the downside of success – over-crowding, under-resourcing and pollution.



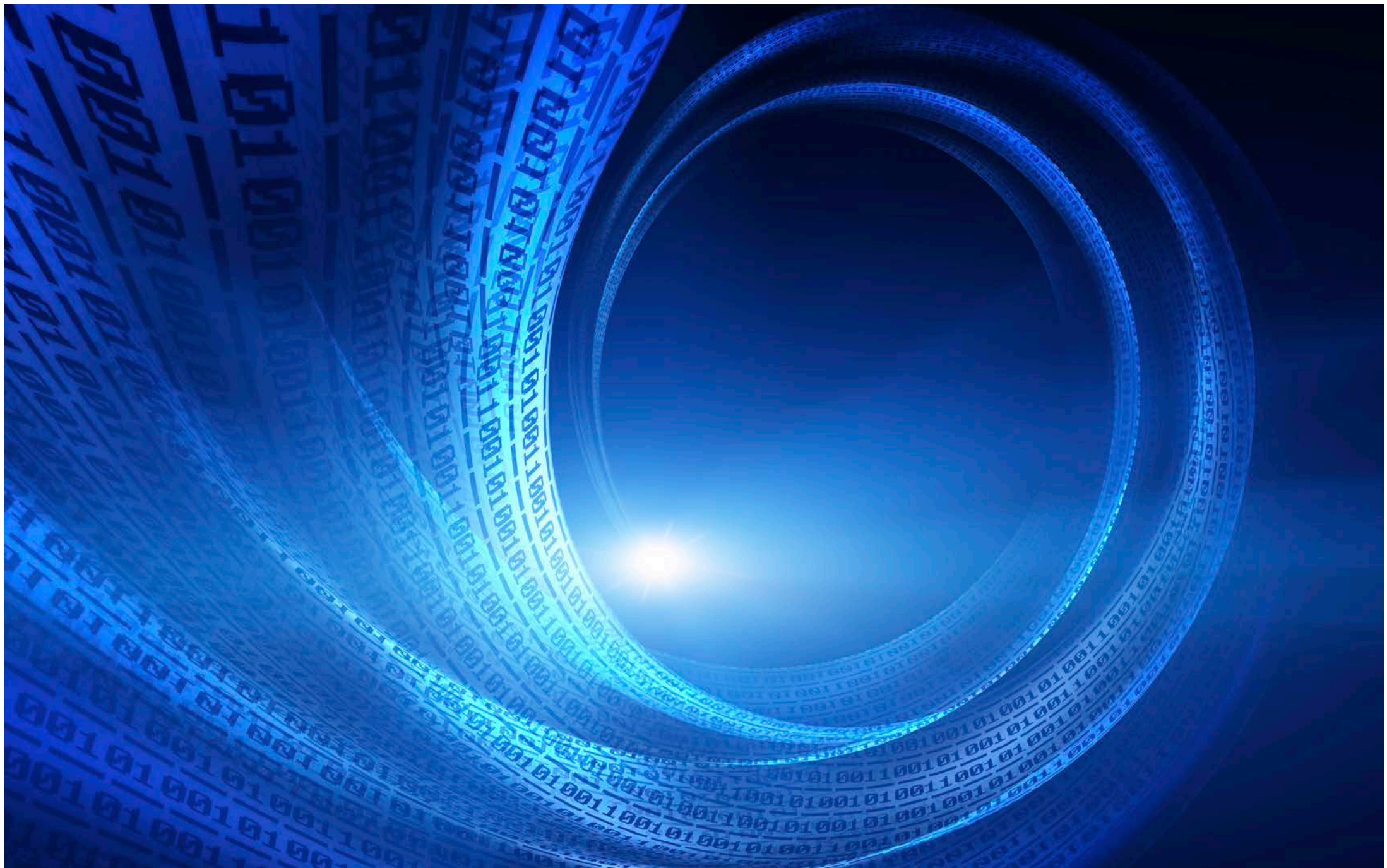
Open Supply Webs

The shift from centralised production to decentralised manufacturing drives many to take a 'smaller and distributed' approach: global supply chains are replaced by more regional, consumer-orientated supply webs and networks.

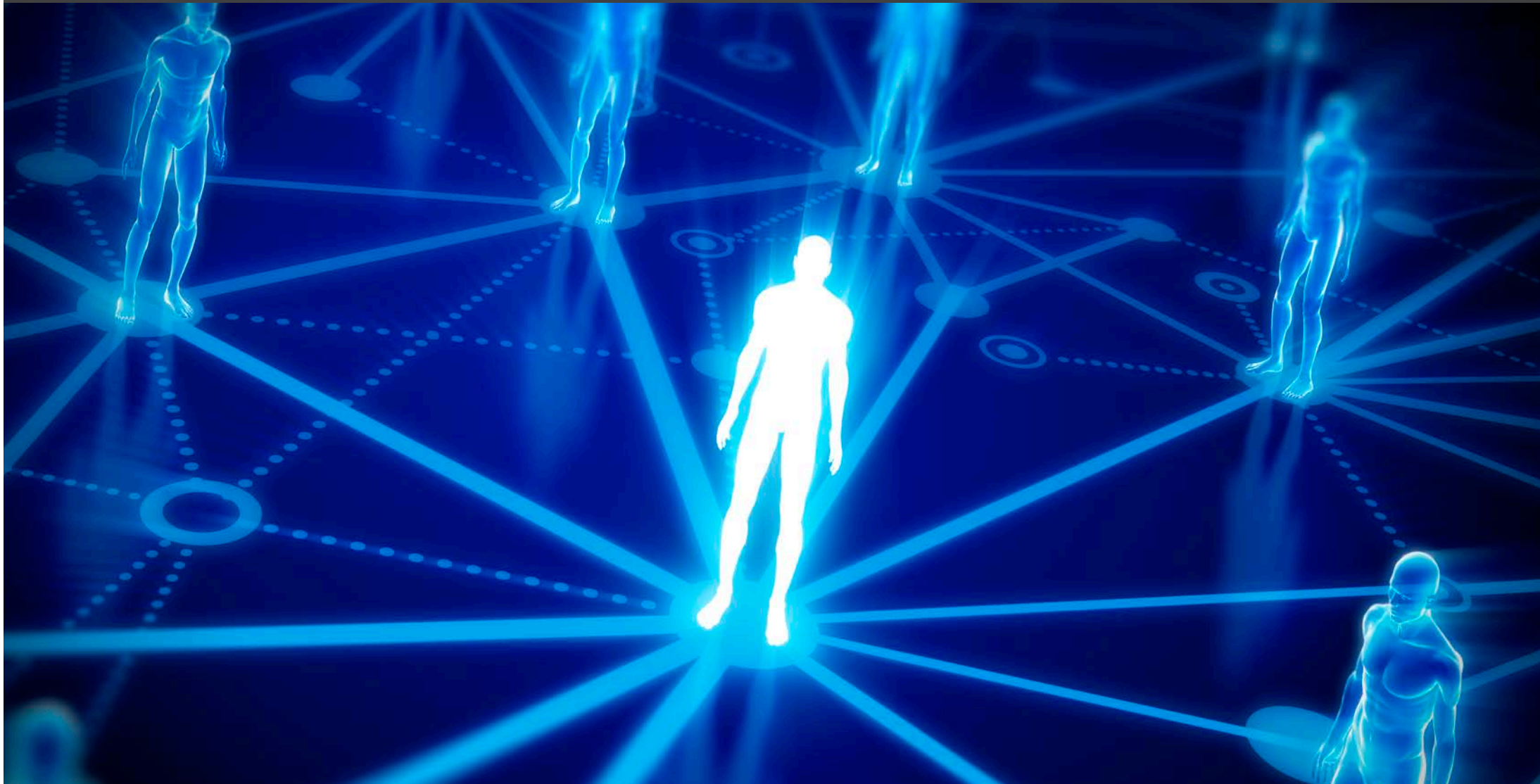


Urban Obesity

Mass urbanisation, reduced activity and poor diets are accelerating the rise of obesity. Levels of obesity in most cities are growing fast and the associated healthcare burden will soon account for 5% of global GDP.

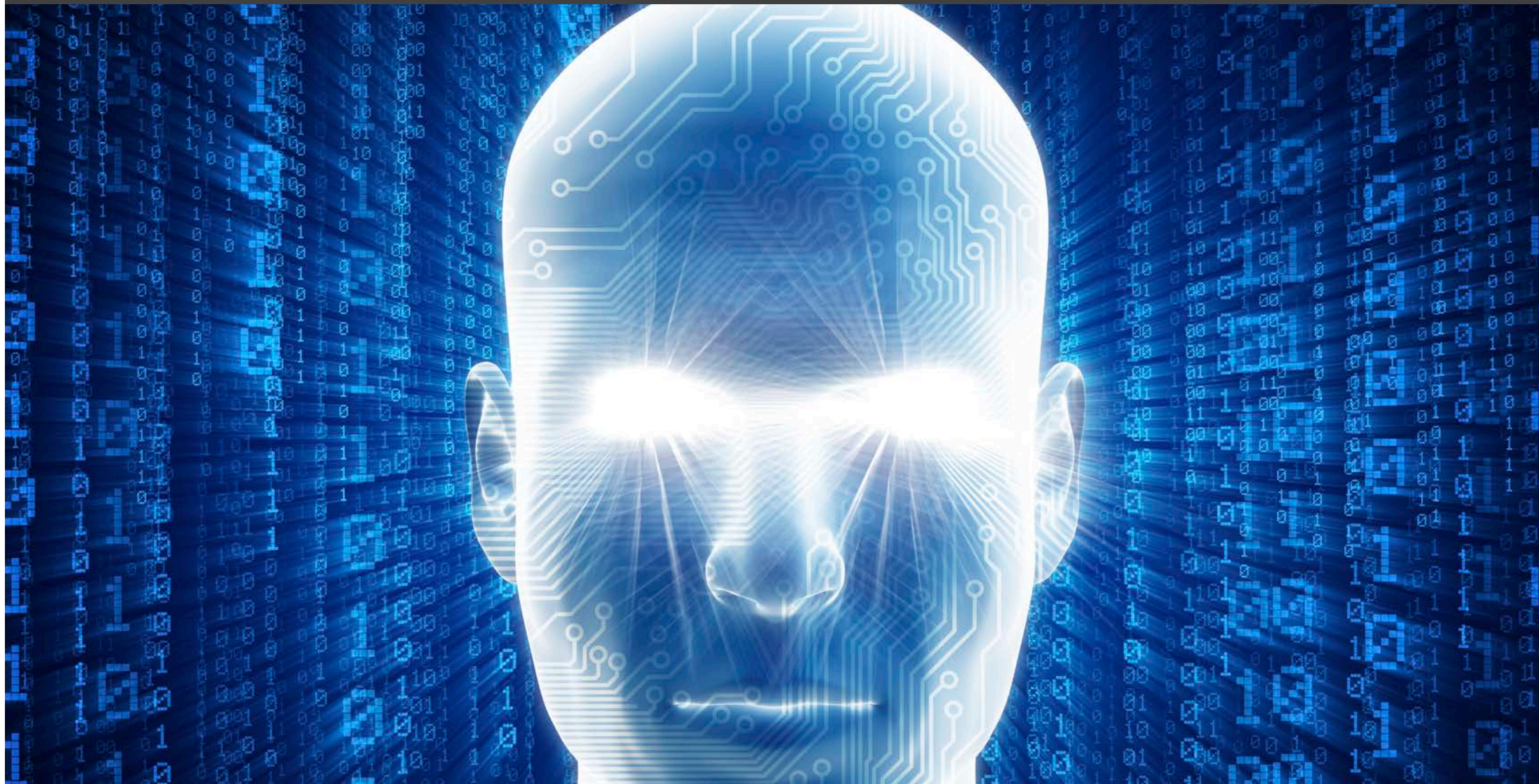


The Data Revolution



Data Ownership

Individuals recognize the value of their digital shadows, privacy agents curate clients' data sets while personal data stores give us transparent control of our information: We retain more ownership of our data and opt to share it.



Enhanced Performance

We are developing key technologies that could integrate humans and data to make us safer, more informed and potentially super-human in performance - but should we?



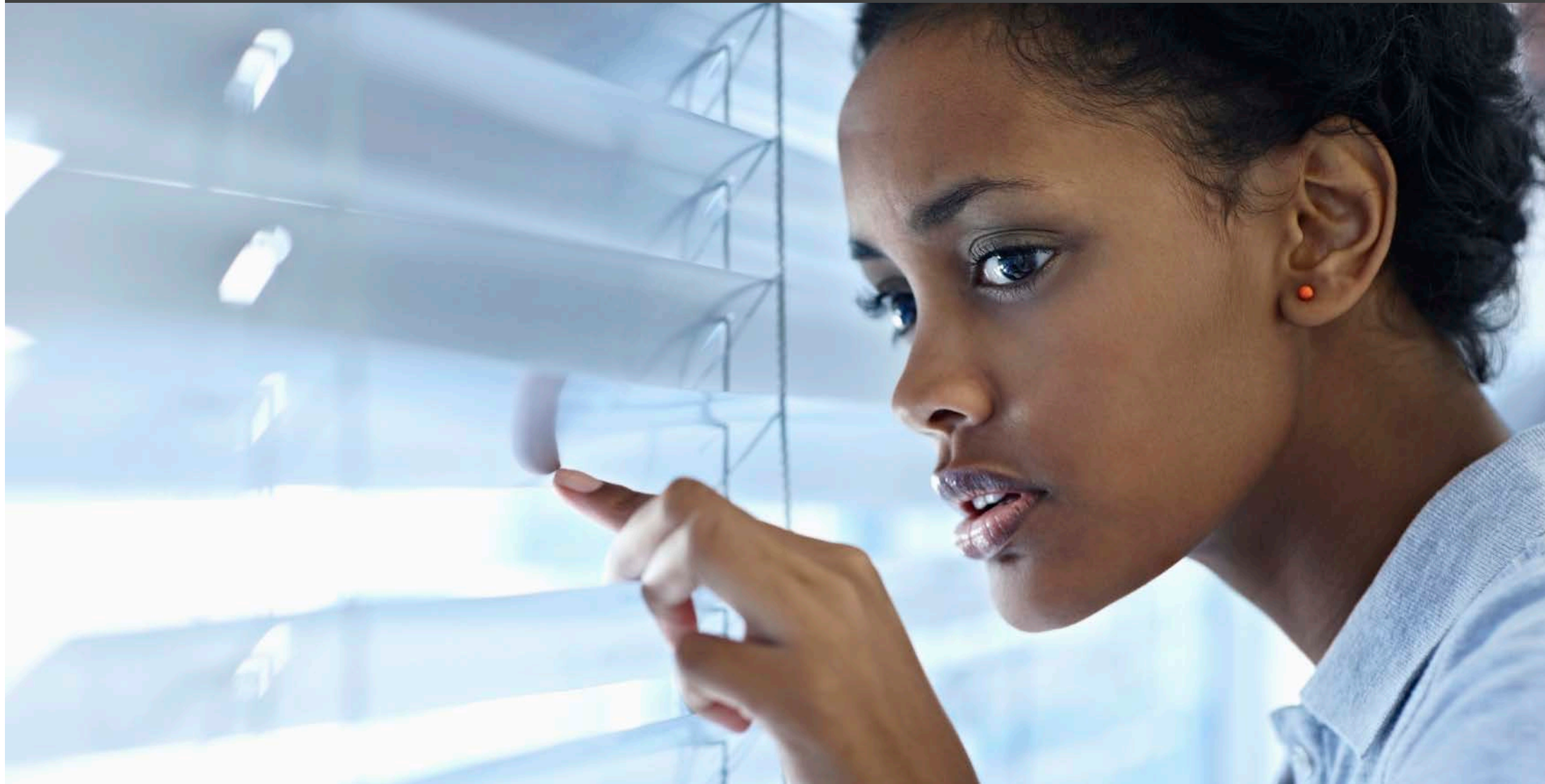
Ethical Machines

Automation spreads beyond trading and managing systemic risk. As we approach technology singularity, autonomous robots and smarter algorithms make ethical judgments that impact life or death.



Privacy Regulation

The push towards global standards, protocols and greater transparency is a focus for many nations driving proactive regulation, but others choose to opt-out of international agreements and go their own way.



The Changing Nature of Privacy

As privacy is a public issue, more international frameworks seek to govern the Internet, protect the vulnerable and secure personal data: The balance between protection, security, privacy and public good is increasingly political.



The Value of Data

As organisations try to retain as much information about their customers as possible, data becomes a currency with a value and a price. It therefore requires a marketplace where anything that is information is represented.



Truth and Illusion

The Internet has democratised knowledge and changed the nature of who we trust and why. As confidence in large organisations declines the search for trustworthy alternatives evolves. What we believe is changing how we behave.



Unequal Access



Access to Transport

The widespread need for individuals to travel short distances becomes a key feature of urban design and regeneration. Planners use transport infrastructure to influence social change and lower carbon living.



Capitalism Challenge

Unable to shake issues like inequality, capitalist societies face cries for change, structural challenges and technology enabled freedoms. Together these re-write the rules and propose a collaborative landscape of all working together.



Caring for Those Left Behind

Although significant progress has been made positive change has limited reach. Millions of people continue to be left behind from mainstream progress - especially the young, the poor and those who are disadvantaged



Education Revolution

Broader access to improved education acts as a major catalyst for empowerment, sustained economic growth, overcoming inequality and reducing conflict. We need an education system fit for the digital revolution.



Mass Engagement

As the public voice becomes easier to access and harder to suppress, leaders seek to engage to create, develop, secure and maintain legitimacy for their initiatives and policies – so further reducing their hierarchical power.



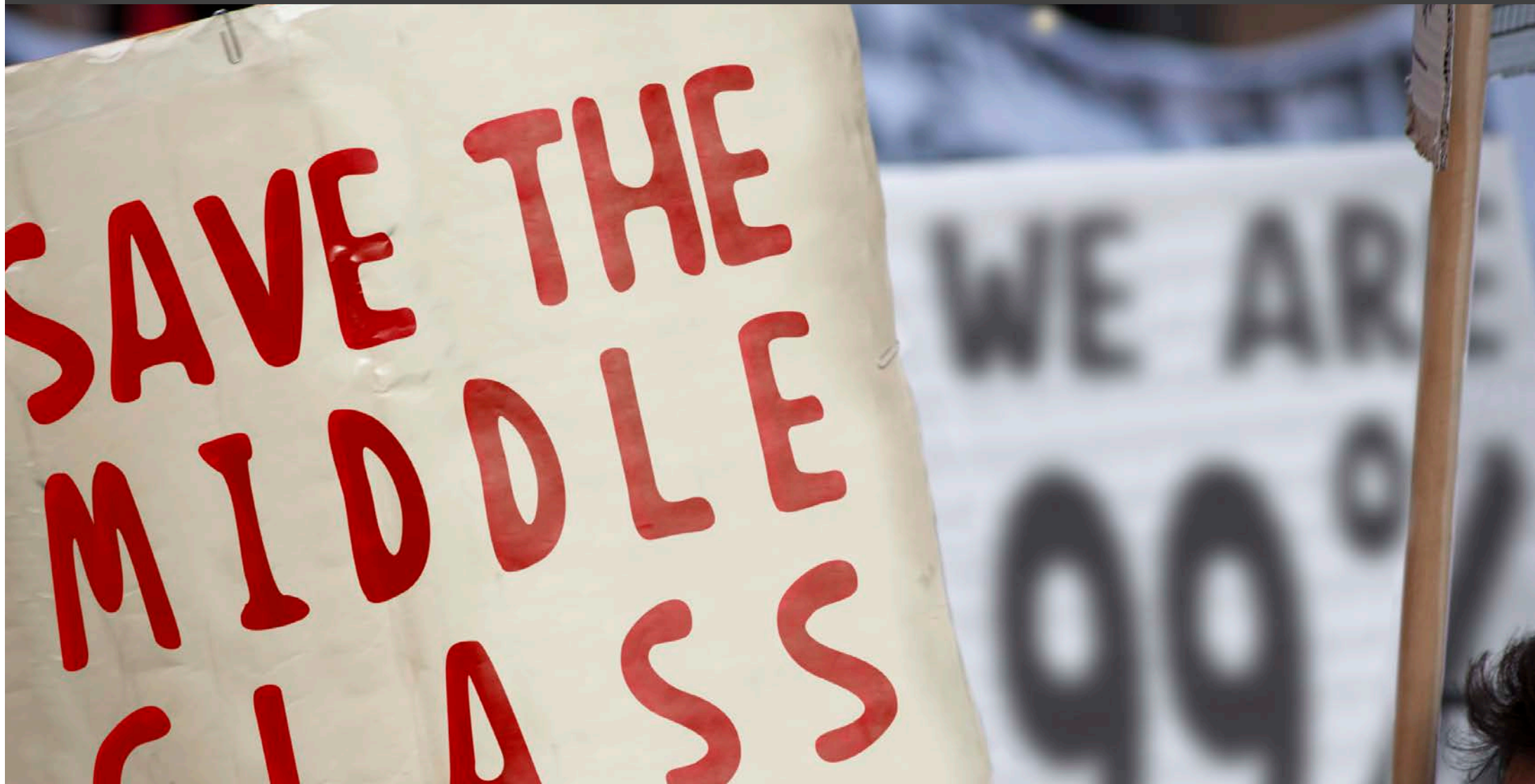
Off-Grid

People living off-grid, by inequality or choice, can exacerbate societal division or improve privacy, health and wellbeing. Either way, doing so provides fertile ground for innovation.



Rising Youth Unemployment

With unemployment rates over 50% in some nations, access to work is a rising barrier. Especially across North Africa, the Middle East and southern Europe, a lost generation of 100m young people fails to gain from global growth.



Shrinking Middle

While the global middle class grows, in the West increasing inequality for some drives a relative decline in middle-income populations. Coupled with the erosion of secure jobs, the US in particular sees a steadily shrinking middle.



Our Habitat



Accelerating Displacement

Climate change, conflict, resource shortages, inequality and political elites unable or unwilling to bring about necessary change all trigger unprecedented migration to the North. Over the next 50 years, as many as 1 billion people could be on the move.



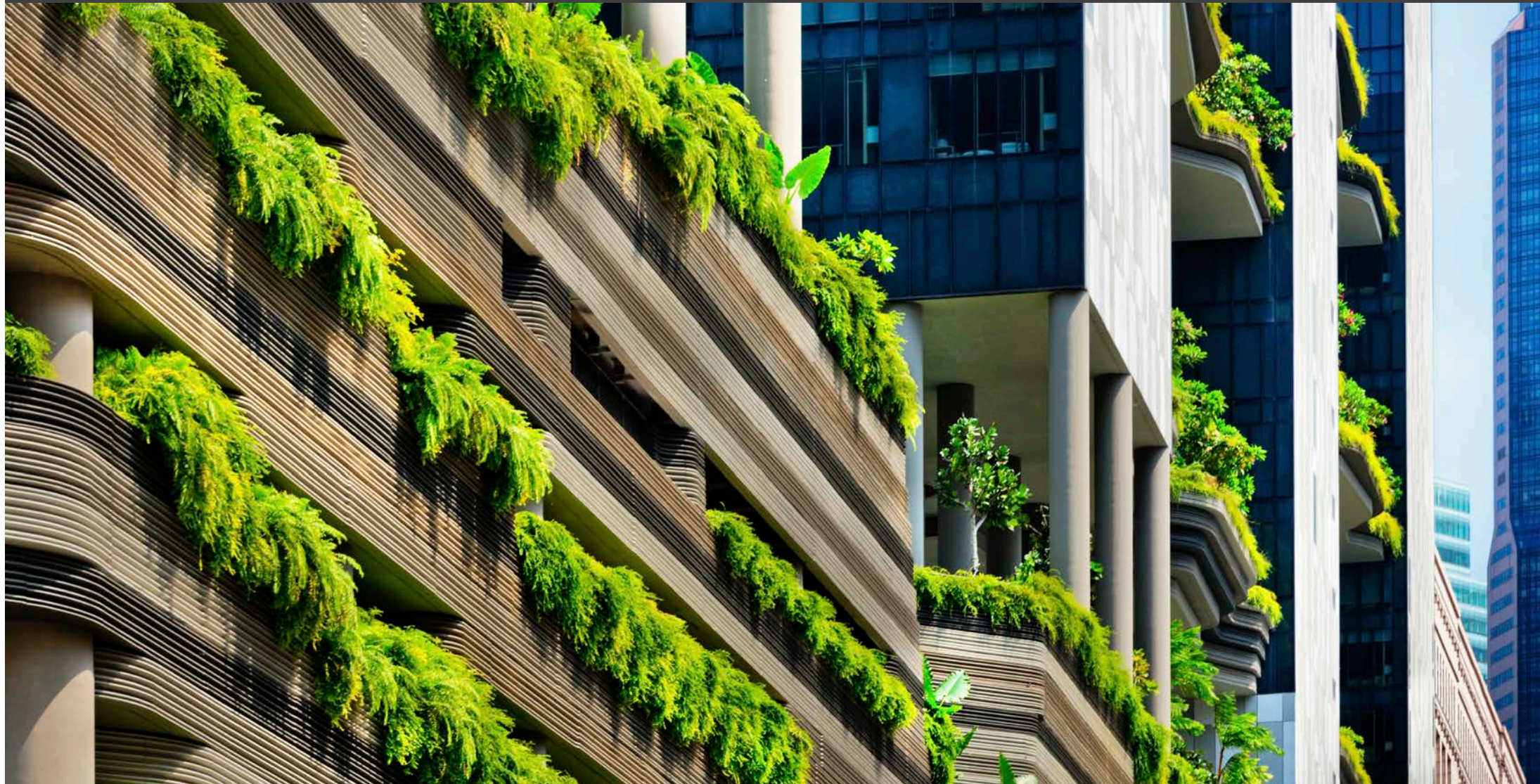
Basic Sanitation

Poor sanitation continues to impact public health and restrict social progress, particularly for women. Governments and donor organisations prioritise measurement, education and innovation in a bid to drive change.



Built-in Flexibility

The path to a connected, accessible and distributed infrastructure is fraught with complex, costly and risky issues: Upgrading and repurposing systems to make them more open plus on-going maintenance need significant resources.



Citizen-Centric Cities

Successful cities will be designed around the needs and desires of increasingly empowered and enabled citizens - who are expecting personalized services from the organisations that serve them.



Flooded Cities

The vast majority of our cities are not prepared for flooding. Many districts and households can no longer get flood insurance and are in jeopardy. It's going to get worse before it gets better.



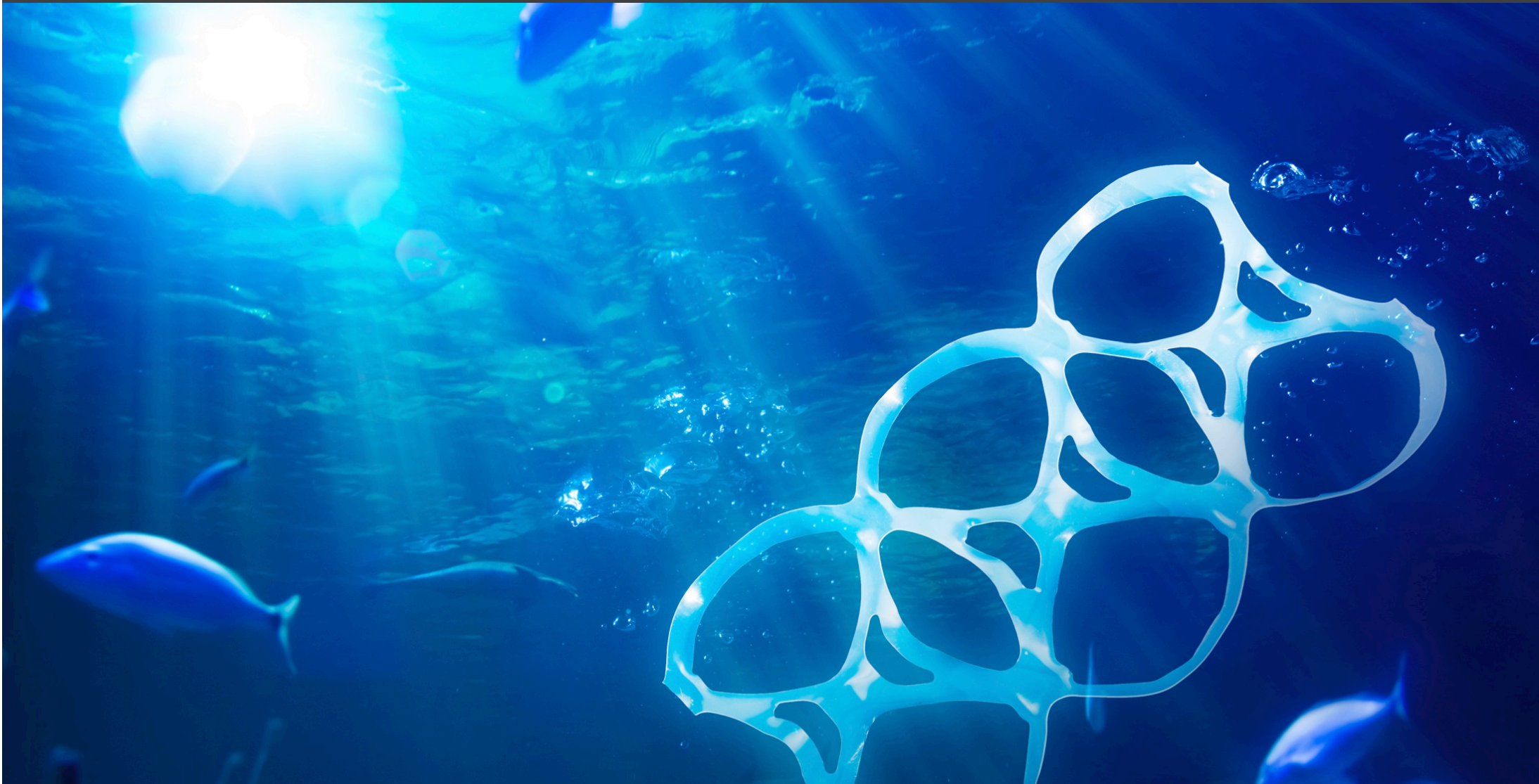
Infrastructure Deficit

Infrastructure again becomes a source of competitive advantage. Emerging economies invest in new railroads and highways for more effective movement of people and goods, while developed nations suffer from poor legacy.



Nature's Capital

In the Anthropocene, humankind is presiding over the Earth's sixth major extinction. But as biodiversity declines, nature becomes increasingly valued and valuable.



Plastic Oceans

There are increasing high levels of man-made pollution in many of the world's seas and little actually disappears. By 2050 there will be more plastic than fish in the world's oceans.



Sometimes Nomads

Elective migration, cheap travel, international knowledge sharing and increasingly transient working models create connected nomads who mix the traditions of home with the values and customs of their host location.



Beliefs and Belonging



Agelessness

A person's physical age becomes less important as society adapts to the new demographic landscape. New opportunities arise for creators and consumers of all ages, though benefits are often only for the wealthy.



Care in the Community

The desire to 'age-in-place' meets a healthcare reform agenda that promotes decentralization. A new care model is customer-centric, caregiver-focused and enhances coordination across care settings.



Female Choice Dilemma

Women in richer economies have greater choice, and with it increased control and influence. This continues to drive change and decision-making but globally the battle for female equality has a long road to travel.



Human Touch

As service provision and consumption becomes ever more digital, automated and algorithmic, those brands that can offer more emotional engagement and human-to-human contact become increasingly attractive.



Keeping The Faith

As people move they take their beliefs with them. For many, religion is one of the few remaining aspects of their previous life, key to their identity - stronger than the citizenship of their adopted country or the nation they left behind.



Working Longer

People are having to work for longer to support longer retirements. Flexible working practices and policies are emerging, but some employers continue to remain ambivalent about older workers.

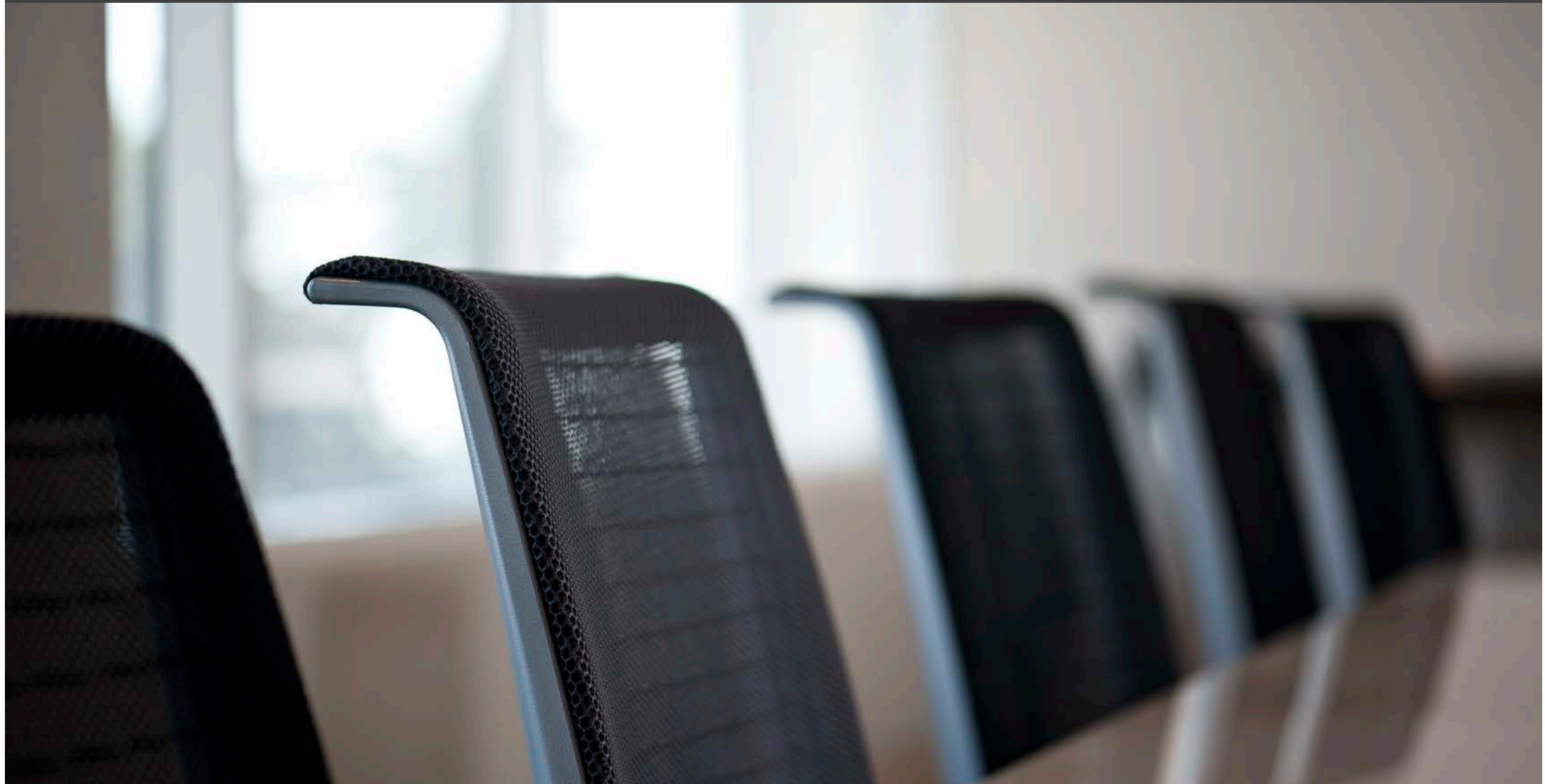


Power and Influence



Africa Growth

With a land mass bigger than India, China, the US and Europe combined, few doubt the scale of the African continent and its resources. However, until recently, only some have seen it as the growth market that it is fast becoming.



Companies with Purpose

As trust in 'business' declines, structures and practices of large corporations are under scrutiny. Businesses come under greater pressure to improve performance on environmental, social and governance issues.



Declining Government Influence

National governments' ability to lead change comes under greater pressure from both above and below - multinational organisations increasingly set the rules while citizens trust and support local and network based actions.



Eco-Civilisation

Over the past 40 years China has grown apace, mostly without concern for long-term environmental impacts. However, now faced with major challenges, a bright light of sustainable development is emerging.



Rise of Nimby

Globalisation of trade and travel, with geopolitical shifts from North to South and from West to East, have delivered many benefits for some - but are causing clashes of cultures and a perspective of political retrenchment for others.



Rise of the Cult of China

As China's economic influence on the world increases there is a rise in the cult of China in popular imaginations elsewhere. Myths of both hope and fear will proliferate as China's cultural influence increases.



Standards Driving Trade

International regulation is progressively aimed at freeing up trade and making it simpler and less bureaucratic – but there are a number of agreements, standards and protocols that some are seeing as increasingly constraining.



Still Being Stupid

Despite a better understanding of the long-term challenges we face, we individually and collectively continue to make decisions that may make sense in the short-term - but do not lead to better longer-term consequences.



shift

Changing Business



Creative Economy

The creative economy helps to build inclusive and sustainable cultures. What's more, it generates wealth. To build scale it requires a workforce comfortable with collaboration, critical thinking and the ability to take a risk.



Currencies of Meaning

New trusted currencies of exchange and meaning emerge to facilitate transactions, trade, authentication and validation. Money is complemented by new systems to which we attach greater significance.



Digital Money

Cash continues to be gradually replaced by digital money, providing consumers with more convenience and choice – and organisations with lower cost transactions. Wider adoption enables new offers to proliferate.



Dynamic Pricing

The algorithms of Amazon and Uber cross over to affect more businesses, from energy use to parking. Real-time transparency allows better purchasing at the same time as margins and yields are automatically enhanced.



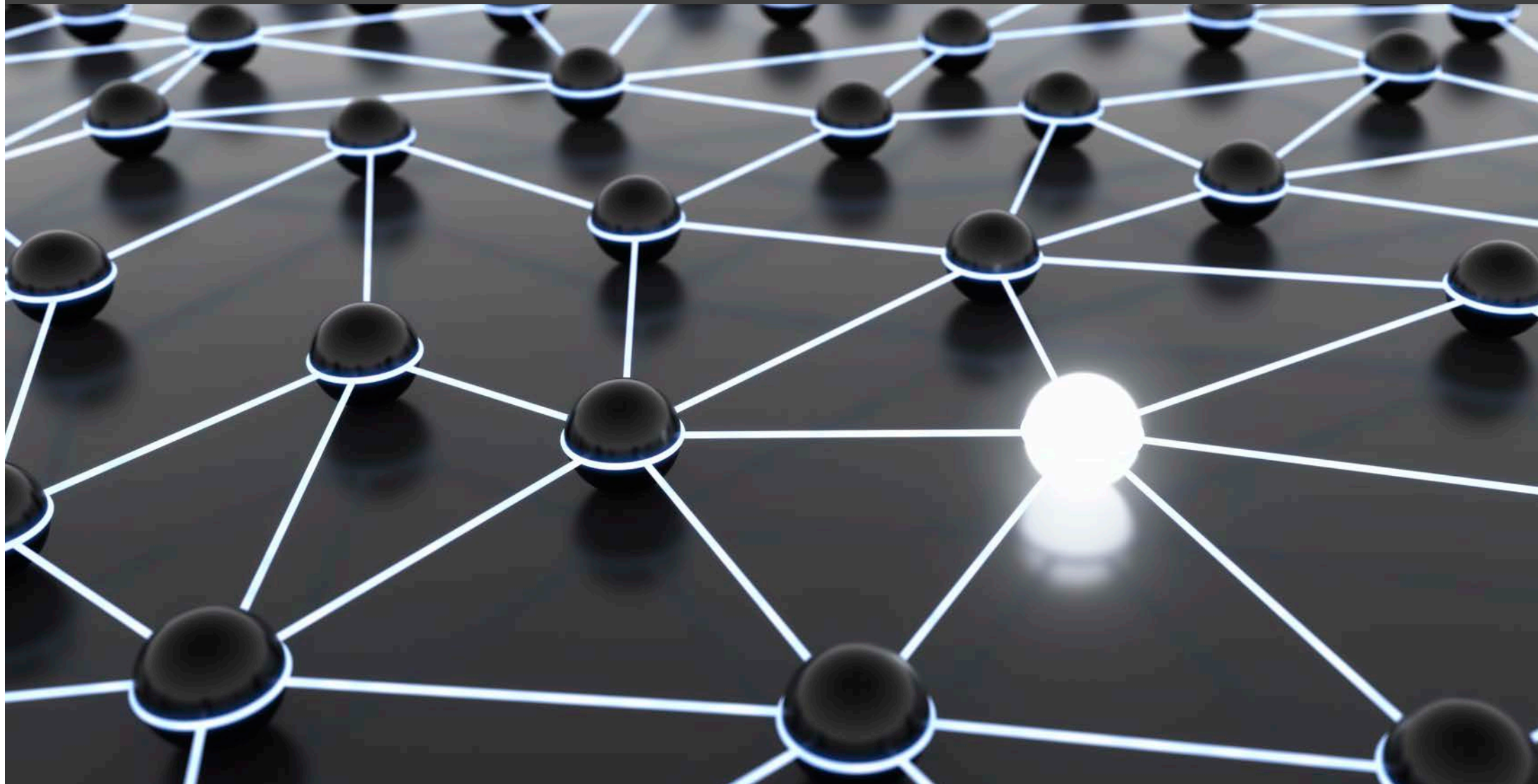
Full Cost

Increasing transparency of society's reliance on nature, intensify requirements for business to pay the true cost of the resources provided by 'natural capital' and so compensate for their negative impact on society.



Optimising Last Mile Delivery

Seamless, integrated and shared last-mile delivery replaces inefficient competition and duplication of goods distribution. Greater efficiency in moving things is as important as in moving people and so a major focus for innovation.



Organisation 3.0

New forms of flatter, project-based, collaborative, virtual, informal organisations dominate - enabled by technology and a mobile workforce. As such the nature of work and the role of the organisation blurs.



Skills Concentrations

The need to build and develop capabilities becomes increasingly challenging for companies and workers alike. Those who benefit from the high-skill reward opportunities remain a select group who move ahead of the urban pack.



Speed to Scale

Greater global connectivity, growing consumer wealth and broader reach all combine to accelerate the time to 1bn customers and a \$10bn valuation for start-ups and new corporate ventures alike.



The Real Sharing Economy

Increasing collaboration drives organisations to reconfigure based on social networks and impact. Real sharing enterprises, not driven by profits, seek to share resources, knowledge, and decision-making responsibilities.

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Future Agenda
84 Brook Street
London
W1K 5EH
+44 203 0088 141
futureagenda.org