Scenario booklet
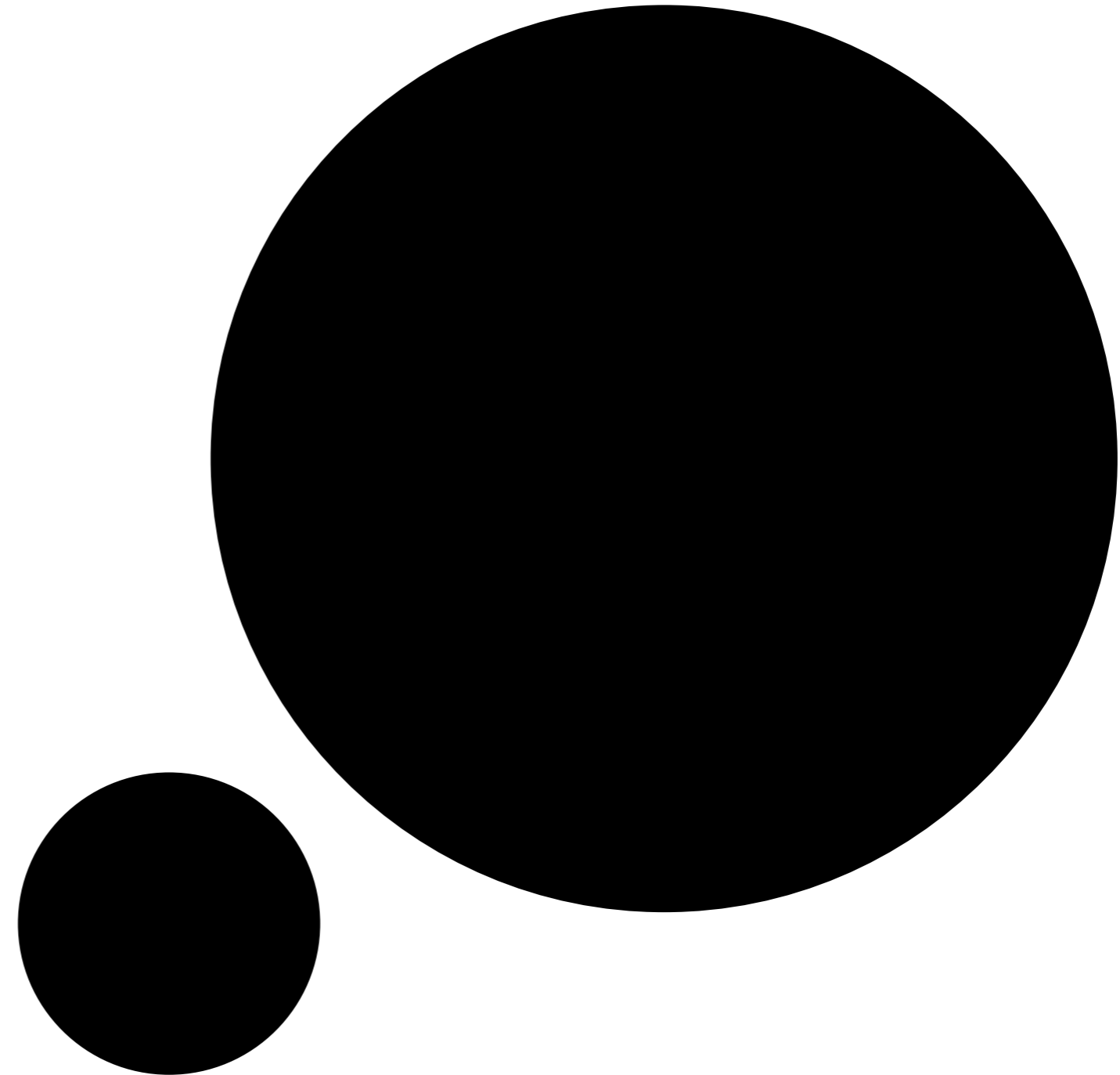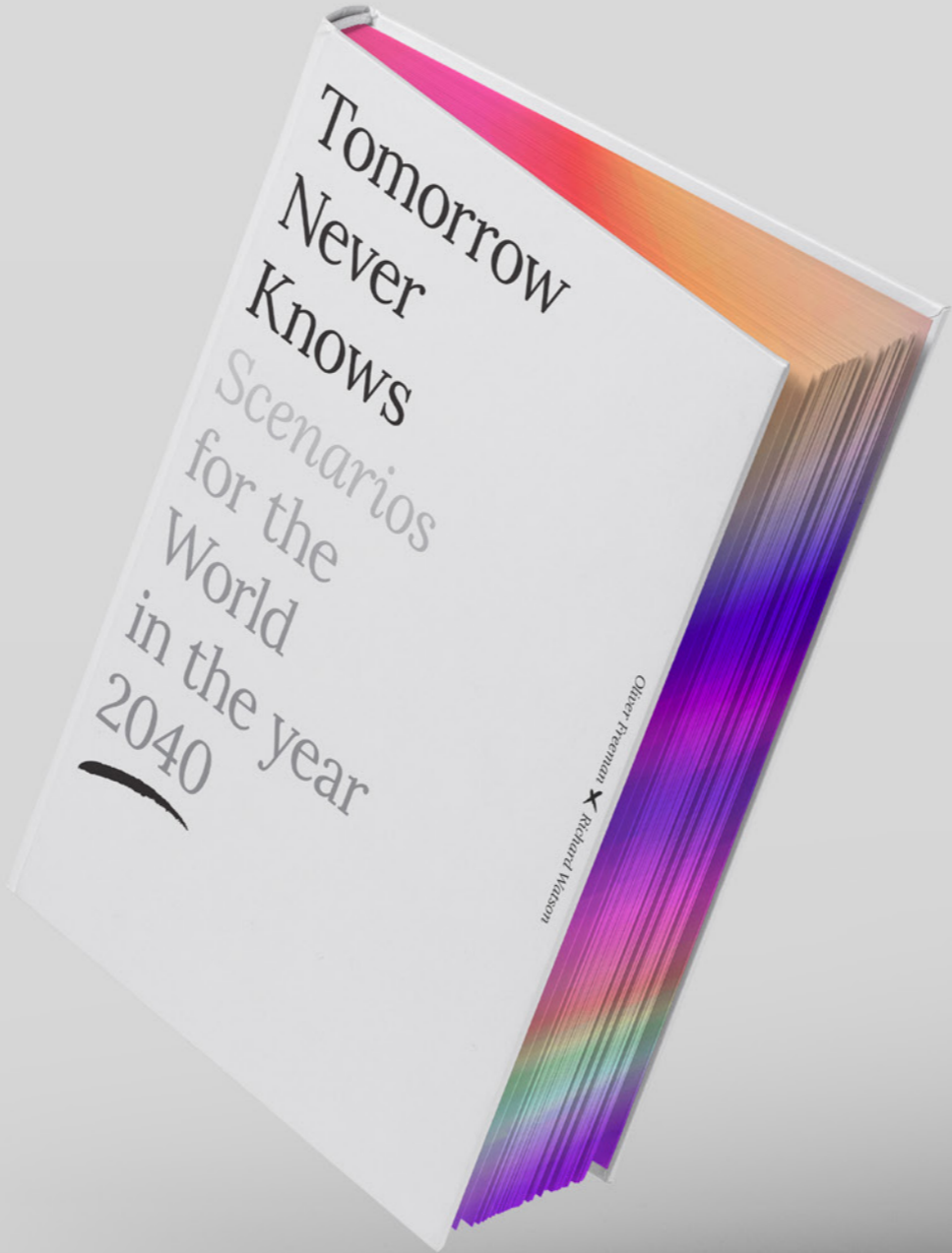
Exploration

September 2020

Tomorrow
Never
Knows

Scenarios
for the
World
in the year
2040

Oliver Freeman × Richard Watson

**TOMORROW NEVER
KNOWS SCENARIOS
FOR THE WORLD
IN THE YEAR 2040**

by

*Oliver Freeman
& Richard Watson*
1 September 2020

'BUT EVERY PERIOD HAS ITS VIRTUES, EVEN A TIME OF TURMOIL'

Amor Towles, *A Gentleman in Moscow*

INTRODUCTION

Back in 2012 we published a book Futurevision: scenarios for the world in 2040. The scenario content of the book was based on work we did on the future of brands with Wayde Bull, Tom Brigstocke, Sandy Belford and their colleagues at Principals, the Branding Agency based in Sydney.

In 2012 we noted the possibility of a pandemic as a highly probable, highly impactful future event. And we saw a fraught future for the US after the Occupy Wall Street demonstrations. We now revisit this book in light of Covid-19 and analyse ways in which the world may now change up to year 2040. In particular, what might be the role of national borders in a post pandemic world, which is to say what is the future of globalisation and alliances such as the EU post-pandemic?

This is a tremendous opportunity. It represents a chance for businesses, governments and organisations to re-vitalise their strategic planning processes and to engage with the ways in which the world is changing after Covid-19. The future starts now and we can help executives and politicians grasp the nettle of uncertainty and manage future risk.

The purpose of building these new scenarios, once again with Principals involvement, is not to build an accurate or granular view of the future, but rather to stimulate broad reflection and debate. What might be the key elements and variables of the new future and how might we might shape our responses? This process hopefully prompts us to deepen our thinking about some of the things that are happening in front of us right now, but also within a broader and more distant global perspective.

Oliver Freeman ✕ *Richard Watson*

Tomorrow Never Knows

Scenarios for the World in the year 2040

The process used to develop our scenarios is based upon the QUEST methodology (questions, environments, scenarios, and transformations) which we developed at the Neville Freeman Agency. In this instance, there is no 'client', so instead we have focussed our attention upon the scenarios themselves and their broad implications, rather than examining specific threats and opportunities relevant to a particular organisation, industry, region or country.

THE QUEST METHODOLOGY

Five distinctive but inter-related phases

1 **Q**uestions

2 **U**topia

3 **E**nvironments

4 **S**cenarios

5 **T**ransformations   Strategic
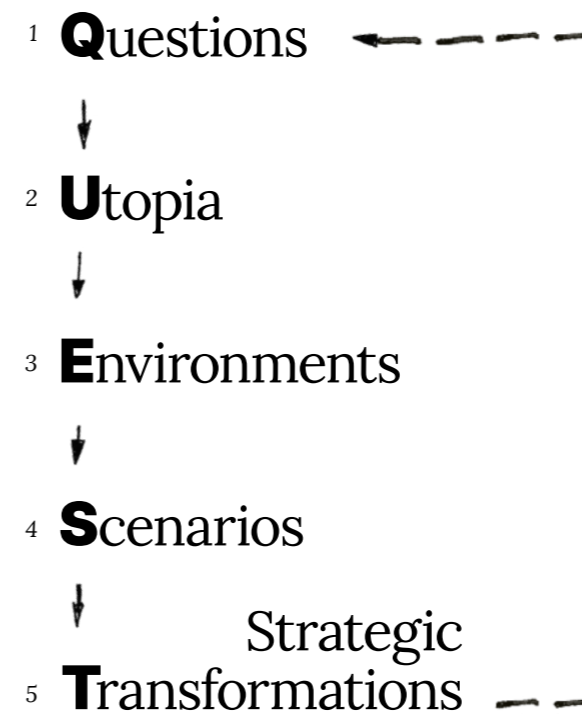
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**1.
FRAMING
QUESTION**

The question used to focus our particular enquiry is: What will be the role of national borders in the world after the COVID-19 pandemic has ended? This is essentially a question about the future of globalisation and nation states and has implications for everything from supply chains to national security.

WHAT WILL BE THE ROLE OF NATIONAL BORDERS IN THE WORLD AFTER THE COVID-19 PANDEMIC HAS ENDED?
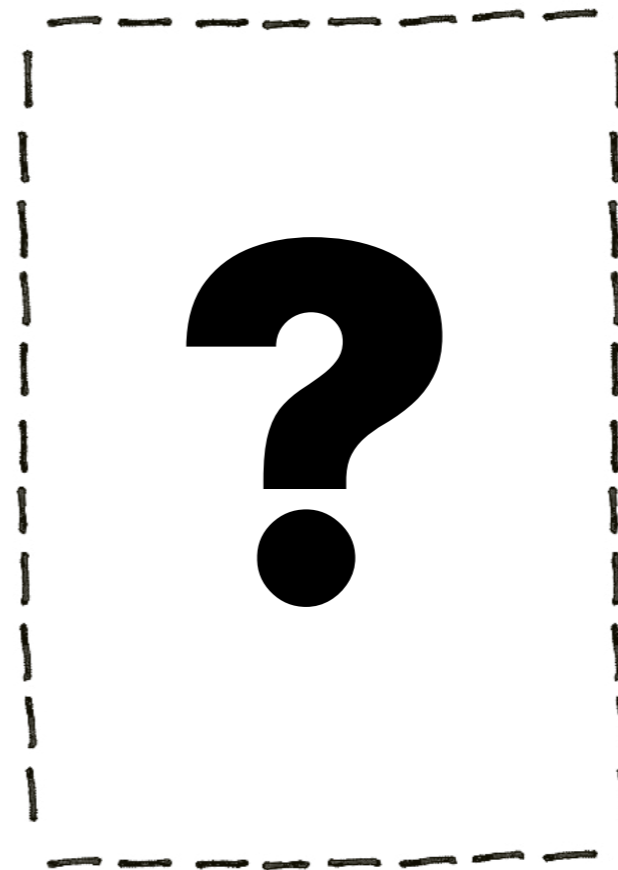
**2.
OUR INFLUENCERS
(SO-CALLED DRIVERS
OF CHANGE)**

Nature

Technology

Society

Culture

Politics

Economics
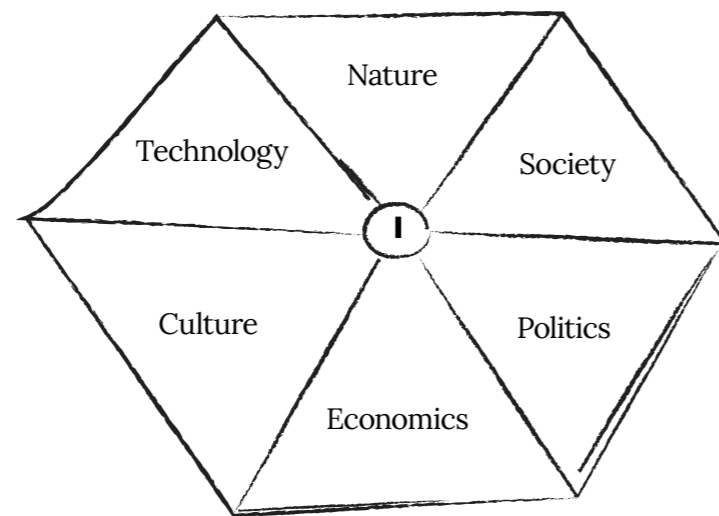
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THE NFA INSPECT PROCESS

We used our INSPECT scanning tool to reveal a list of influencers capable of changing the world as we have grown used to knowing it.

Then we shared this list with a small group of individuals for comment and criticism. We also asked people to nominate any influencer that they thought might be missing from our list.

The influencers are ranked in descending order of their importance and volatility and displayed with a continuum of possible outcomes which, when taken together, will create alternative futures.

12
APOSTLES OF *Change*
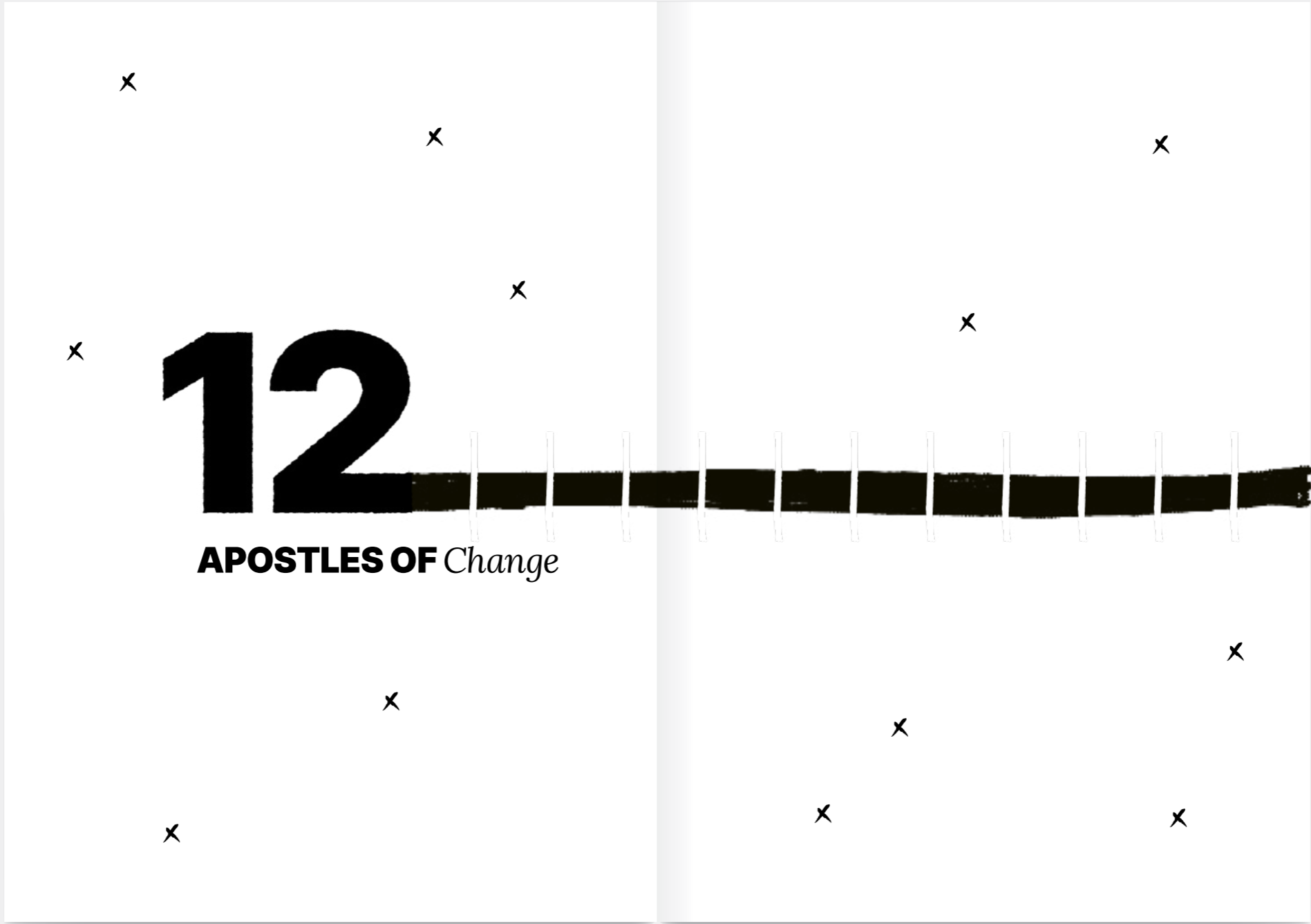
NATURE: #1

NATURAL SYSTEMS CHANGE
(Organic/ Disruptive)

Our interest is in the way the earth's biosphere and its ecosystems might change over time. We are not classifying this as climate change because in view of the history over the last 20 years, it is an unhelpful abstraction. But we are interested in the behaviour of droughts, floods, sea-levels, rainfall, temperature, bio-diversity and so on. However, occasioned, (naturally or by humans) how will these changes play out? Will governments play an interventionist role or leave things for the market to decide? Will the impact of the way natural systems behave be extreme enough to be unmanageably chaotic?

NATURE: #2

GENERATIONAL VIEWS TOWARD THE ENVIRONMENT
(Organic/ Disruptive)

Tracking the changes in natural systems does not in itself generate policies for action to affect or change them. Worldviews are critical shapers of the way policies unfold and we are interested in the future impact of generation-based views about the natural environment and natural systems on public policy.

SOCIETY: #3

SOCIAL ORIENTATION
(Me Vs We)

Me — — — — — — — —

Since the global changes in economic policy brought about, notably, by Reagan and Thatcher in the 'eighties, we have lived in a western world that is dominated by empowered individualism in its many forms: the American dream, 'me' not 'we', neo-conservatism etc. This has brought about an increasing intensity in the competition between not only individuals, but also nations, for example in secondary education performance, sport etc.

The current weakness of global and regional organisations, such as the UN, WHO, WTO and the EU, many of which were largely created after WW2 by the winning Western powers, expresses this shift as well. Ironically the UK's Brexit decision can be seen another expression of national individualism, as can Trump's rallying call to 'make America great again'. Can we expect the EU and all multilateral relationships to be particularly vulnerable?

We

Ironically, the COVID-19 Pandemic brought about a radical shift along the social orientation continuum towards we/us/community and away from me/myself /I at an individual and local community level, although international cooperation was at times patchy.

In scenario terms it (collectivism) is now predetermined as a key influence, but the foresight issue is for how long? Will we revert to the selfish meme or not? How post-pandemic debt is repaid (by the many or by the few) will be an interesting topic.

DYNAMICS OF COMMUNITY RELATIONSHIPS
(Physical/Virtual)

COVID-19 has brought to life in all sorts of ways the virtualisation of community relationships as a result of social distancing and the closure of traditional work-places, entertainment venues, schools and the like. Is the transformation of relationships from physical to digital a change that will last? Or will we revert to the way things were? To what extent will an integrated physical/analogue and digital /virtual world replace the idea of a world which is either analogue or digital?

POLITICS: #5

GROWTH OF SURVEILLANCE STATES
(High/Low)

Social media and streaming providers– Google, Apple, Microsoft, Amazon– have abruptly changed the political and social dynamics of macro-economics. We now live in a world where human behaviour has become a commodity to be traded for commercial and political gain. Some of the applications are not much more than mild irritants for individuals, but others are more sinister. It's as if Big Brother is now a fixed feature of the social landscape that threatens our freedoms and security. And a feature that operates in secret and undermines our traditional understanding of democracy.

POLITICS: #6

TRUST IN POLITICIANS/EXPERTS/ MEDIA/ELECTIONS
(High/Low)

There was a time when the role of politicians and experts was honoured by the citizenry as being central components of social security and safety. Our trusted leaders and spokespeople. But with the rise of populism and radicalised media these roles have been diminished. It is a feature of two-party electoral systems that the political parties are seen to be competitive with each other and seeking democratic power. But now they have been disenfranchised by populist voters who see all parties as being as bad as each other. Populism is the enemy of representative democracy; the elephant in the polling booth.

ECONOMICS: #7

FOCUS ON ECONOMIC GROWTH VS SOCIAL WELLBEING
(High/Low)

The tension between the promotion of economic growth in capitalist systems (financial capital and economies have to grow) with social wellbeing (our responsibility to care for the planet and each other) has been the central issue in the climate change debate, which COVID-19 has pushed from the fringes of left-wing activism to centre-stage for everyone to consider. But, once again, how will this play out after the COVID pandemic has ended? And how will inequality progress between and within nations. Quantitative economics is all about measurement, but are we measuring the right things? Most scenarios play out within variations of a capitalist, free-market narrative, but what if this narrative were to change?

ECONOMICS: #8

DYNAMICS OF THE ECONOMY
(Physical/Virtual)

In the world of pandemics, digital is king. Will the threat of future pandemics, or geopolitical instability and unrest, promote the continuation of this trend? Or will we see the development of the nation state as a fortress with a focus on autarky, local production of goods and services and the predominance of the physical? Is globalisation a bundle of disparate influencers (the movement of goods, people and capital) or an integrated and systemically connected set of activities?

CULTURE: #9

SOCIAL ORIENTATION
(Empathy Vs Antipathy)

A by-product of the growing emphasis on the needs of community versus individualism, comes a possible shift in the ethical basis of our relationships with each other. How will this play out in the future? Will empathy replace 'business is business' in the workplace? Will teamwork supplant the egotistical high fliers? Will local governments embrace all aspects of community?

CULTURE: #10

CONSUMERISM
(Self-centred/ Convenience Vs Sustainable)

This is a tension that has been trending for the last 50 years. Sustainability can drive profitable business development provided consumers identify with the brands that focus on social responsibility. We may also see new conflicts in the regulatory sphere between the demand for consumer protection and that of producer freedom.

TECHNOLOGY: #11

IMPACT OF AI
ON THE WORKPLACE
(Job substitution/
Job expansion)

In a world of pandemic-driven isolationism, the need for and role of AI-based work practices increases sharply. It is evident that AI will have a dramatic an impact on the future of work as the industrial revolution did in the 19th Century. But what will the implications be for human employment? The history of work suggests that technological innovation is positively transformational rather than a destroyer of jobs, but might such history change?

TECHNOLOGY: #12

HUMAN
LONGEVITY
(Organic/
Disruptive)

Increasing human longevity has been a sleeper in recent discussions about the future, particularly as COVID-19 has been more lethal among older people and diseases like obesity and diabetes have increased their death rates. But are we in for a rude awakening as underlying improvements in health care and biotechnology abruptly increase longevity to well over 100 years for some? The impact on community care, superannuation and equality will be significant. Or might diet and sedentary (screen-based) lifestyles bring developments in the opposite direction?

NOT TO FORGET

→ **NATURE**
Non-Renewables: Food Production; Fisheries: Desertification

→ **SOCIETY**
War and Hunger; Mass Migrations Pressure; Population Growth: Inequality; Health Equality; Organised Crime; Cyber-Crime; attention –spans; informational security/stability; trust.

→ **POLITICS**
Re-emergence of 'the third way'; Ideological Intransigence: Global Institutions: Governance; Xenophobia & Trade Wars; Geopolitical Trust; Impact of China on Global Politics; future direction of the EU; regional alliances; future of Africa and Latin America; governance; colonisation of space.

→ **ECONOMICS**
'New Economics' Theories and Philosophies; Global Supply Chain; Work as a Proportion of Active Life; Wealth Inequality; Nations as Economic Players; Nations vs. Corporations.

→ **CULTURE**
Racism; Migration; Shift from the Western to the Eastern (decay of the US and Europe and rise of China); Appreciation of Complexity; The Degree of Displacement of the Mechanistic by the Systemic; Gender and Identity.

TECHNOLOGY
Renewable Energies; Waste Management; Decentralisation of Work; Quantum Computing; Consolidation vs Fragmentation of Big Tech, Ethical Constraints of AI and other emerging technologies.

3.
OUR SCENARIO
MATRIX

Having debated whether or not
we agreed with the rankings of
influencers (which we did) we
discussed which two influencers
might work well against each other
as a matrix and drafted a number
of alternatives. Thoughts we had
included the following:

ECONOMIC PRIORITIES (Growth/ Sustainability)		**GOVERNANCE** (Centalised/ Localized)
PHYSICAL CONTROL OF BORDERS (High/Low)		**INTERNET OF THINGS** (High/Low)
IMPACT OF AI ON WORK (Employment/ Re-employment)	**VS**	**SURVEILLANCE** (High/Low)
FOOD SECURITY (High/Low)		**SUPPLY CHAINS** (Local/Global)
DOMINANT GLOBAL CULTURE (West/East)		**MASS MIGRATION** (High/Low)

Eventually, we settled upon Change in Natural Systems (disruptive against organic) vs. Economic Priorities (growth of the market against social wellbeing), which was later revised to Management of Natural Systems (chaos against control) vs. Economic Priorities (profit against principle).

It should at this point be noted that a health vs. economic wealth dynamic, or dilemma, had been a central feature of almost all countries reaction to the early stages of the pandemic. Also, that by natural systems we do not simply mean climate change, but natural systems in the widest sense and the human reaction to change in such systems, so climate change, but also elements such as bio-diversity, top soil erosion, ocean acidification, water catchments, water aquifers, atmospheric circulation systems, air quality, plant pollination and, most importantly perhaps, the human reaction to any change in these systems. Our work stresses the importance of the way we see the world as a key policy shaper.

The next step was to name each of the scenario worlds in a way that would sum up each one instantly. We initially named each of the scenarios after symbolic states (USA, China, Sweden, and Australia).

However, this approach suffered from being both too generalist and too specific.

Moreover, things were moving fast at the time and Sweden, in particular, was rapidly shifting between a national that symbolized partial success in response to Covid-19 to one that represented partial failure, so we decided that using countries would box us in too much.

In the end we used song titles, specifically Beatles songs, which is something we had done with different Beatles songs in the matrix we created for Futurevision back in 2012.

**MONEY,
THAT'S WHAT
I WANT!**

(R)EVOLUTION

Management of Natural Systems

CHAOS

Economic priorities

PROFIT

PRINCIPLE

**THE LONG
AND WINDING
ROAD**

**HERE
COMES
THE SUN**

CONTROL
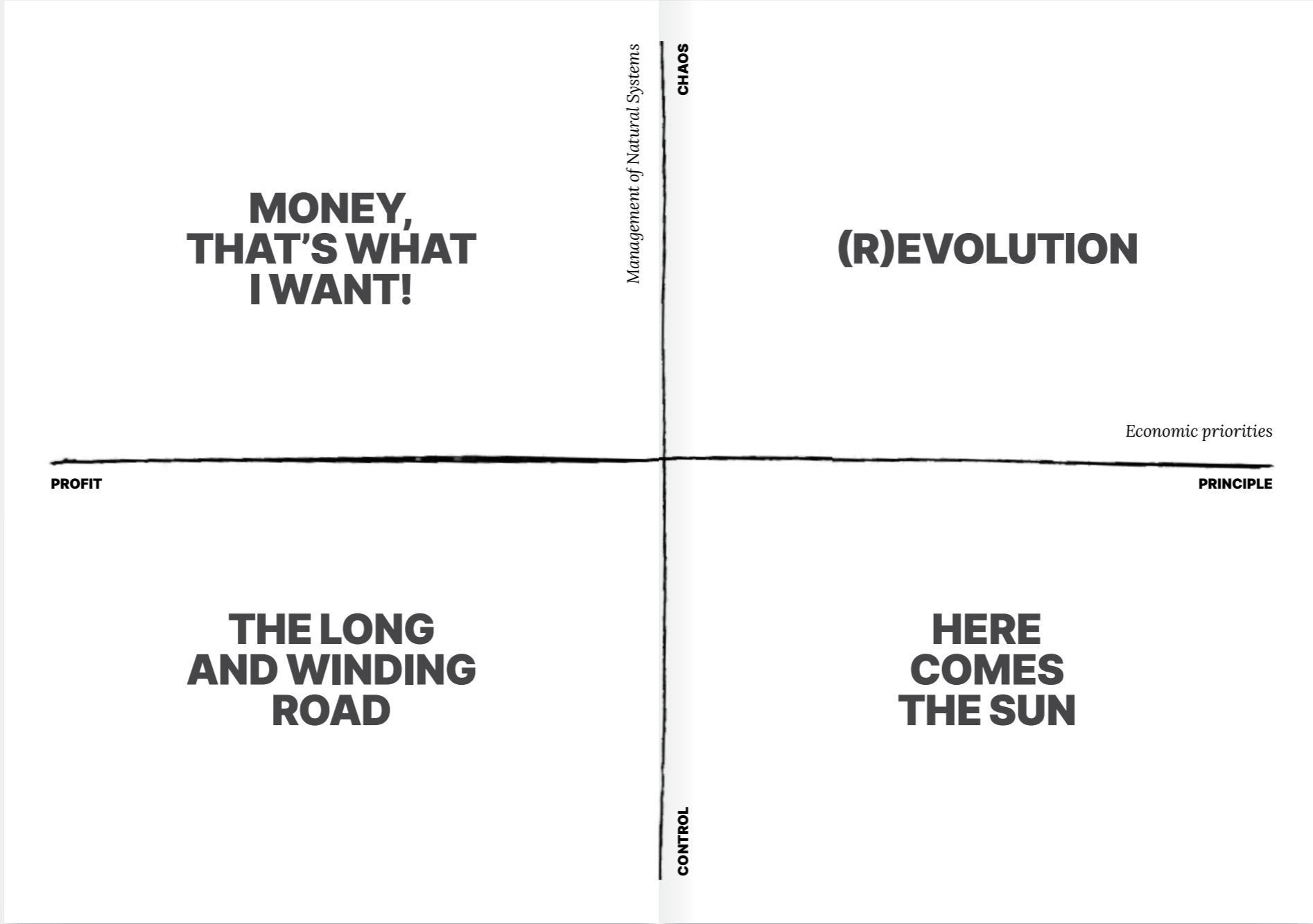
**THE MATRIX
IS ELEGANTLY
SIMPLIFIED
EVEN FURTHER...**

Scenario planning is a process that embraces uncertainty and anticipates more than one future. The matrix approach indicates four futures among many but which, despite their limitation, when taken together offer a set that is rich in diversity and alternative future environments.

Of course, the future doesn't spring into being fully fledged on the agreed future date but is rather revealed as a result of the interaction of the influencers shaping the world, over time, and often in surprising ways.

The TNK Scenarios obey this rule and we find it helpful to write a snapshot for each scenario, together with the early warning indicators which may indicate its emergence. You can think of it this way: the snapshot is a photo of the end point of the scenario, its destination; the early warning indicators are the stations on the way that suggest this destination is in sight.

Management of Natural Systems

CHAOS

Economic priorities

PROFIT ——————————————— **PRINCIPLE**

CONTROL
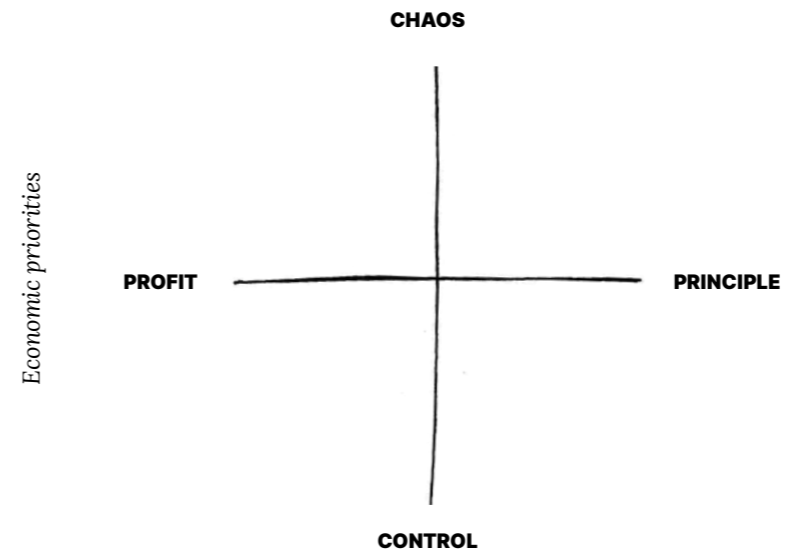
4.
THE SCENARIOS

**MONEY,
THAT'S WHAT
I WANT!**

S2

(R)EVOLUTION

S3

**THE LONG
AND WINDING
ROAD**

S1

**HERE
COMES
THE SUN**

S4

S1

THE LONG AND WINDING ROAD
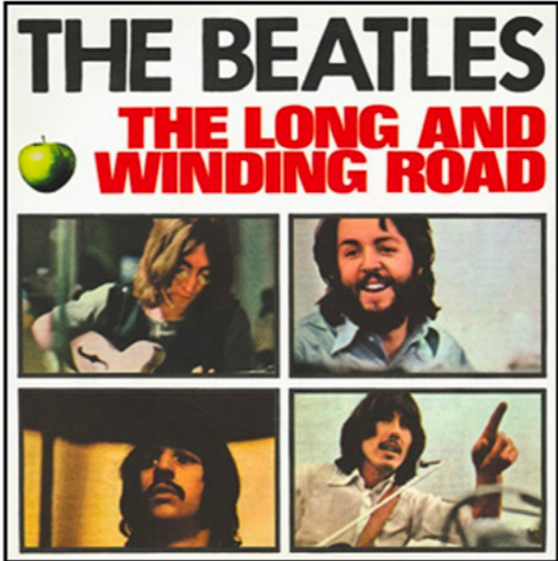
(Profit ✈ Control)

S1
SNAPSHOT

This is a profit-driven world where free markets are trusted to solve most of the world's problems and have brought the worst of natural systems change under control or, at least, anticipated the worst impacts and allowed for adaptation.

Trust in politicians is high, as is belief economic growth. However, national boundaries operate differently depending upon whether they are viewed as physical or virtual domains.

Globalisation is still the driving force behind most economic activity, which is now dominated equally by the US and China. This has created a level of geopolitical stability, although this balance is continually being tested, especially in the digital sphere, where a handful of large firms dominate what is still a largely borderless and unregulated world, although these giants are sometimes toppled by agile upstarts. Within physical states, in contrast, a 'circle the wagons' or 'they shall and not pass' ethos exists whereby local nations seek to maximise their competitive advantage by restricting what is allowed to enter.

Physical restrictions on migration are enforced using digital surveillance, a technique first used during the pandemic of 2020 when nations sought to minimise virus exposure and maximise compliance with restrictions on movement. Restrictions on movement have been supplemented by green surveillance too, which seeks to monitor how people consume and, in particular, how items are discarded (a valuable new revenue stream). Waste is now big business, although the idea of a fully circular economy has stalled due to the need to incentivise further consumption.

One thing that did not survive the pandemic is the attitude towards care. People are generally left to fend for themselves, economically and health-wise, although this attitude does not extend towards the environment, which is monitored and cajoled into conforming to human wishes. Nevertheless, wild and windy nights continue alongside heavy rainfall, droughts and wildfires, although the response to this is not a modification of human actions, but simply investment in AI-modelling to predict such occurrences alongside mega-scale geo-engineering projects to reduce the very worst impacts of natural systems collapse. Such projects are one of the few areas where global cooperation continues, although this is partly due to the profit potential of green schemes. Elsewhere a somewhat backwards looking and defensive mind-set dominates policy-making.

The underlying cultural feature of this world is expressed in its title. The anguish caused by the direction society is moving, alongside a nostalgic desire to slowly travel back to safer and more certain times.

S1
A DAY IN THE LIFE

SAANVI, 30, FROM BENGALURU, INDIA

I read the news today, oh boy.

The week-end queues at the airport are the worst they have ever been because of the number of people from China who are using their new Asian Union passports to get into our country without jobs to go to or the 40m rupees required for a business migration certificate. The airport can't cope but fortunately airport hotels, mindful of their role in the Covid-19 lockdowns from the 'twenties, are successfully offering quarantine for would-be migrants to be processed by the private companies providing protection and surveillance services. Privatisation has been the big winner in the economy of our city with all major health, education and transport services being owned by multi-national corporations.

These corporations also rule the roost in the digital arena employing people like me to provide mainly global services. These corporations are good for business but, as with my 70-year old mother, they don't light the fire when it comes to community care. Her dementia was diagnosed fairly early but we (I have four sisters and two brothers) have struggled to stump up with the cash needed (also 40 m rupees) to buy Fatima a place in a care home. So, we have a roster to share care in our homes with her moving to the next child every six months. The sharing we do as a family is typical of how Indian families survive. On the whole, it is a good thing but the underlying inequalities in our society continue to grow. The abandoned caste system has ironically not been replaced by something better. The dictates of the free market are overpowering for many of us as we move slowly forwards. One saving grace has been the reduction in population growth as families down-size to meet economic expectations.
But I ask myself everyday –

Where are we going?
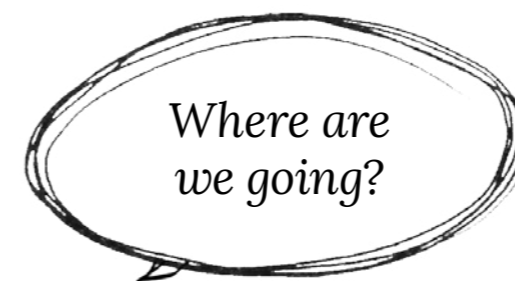
S1
EARLY WARNING INDICATORS

- [ ] Traditional corporate and political structures hold their ground
- [ ] Free-markets drive necessary adjustments
- [ ] Climate and eco-systems stabilise
- [ ] Economic elites flourish
- [ ] High trust in politicians and experts
- [ ] Emphasis on small government and big business
- [ ] Populism growing in power particularly in social media
- [ ] Surveillance, mainly cyber, at all levels is endemic

- [ ] Renewed belief in the role of politicians & experts
- [ ] Continued corporatisation of the public sector
- [ ] Growth of smart-cities
- [ ] Growing control of natural disasters
- [ ] Key human decisions ceded to machines
- [ ] Strategic equilibrium between the US and China
- [ ] Inequalities remain
- [ ] Status quo remains

**S1
IMPLICATIONS**

For National Borders

- Migration policies are political/
  economic not humanitarian/social
- Surveillance is high

For National Borders

- National pride is strong but global roles
  of nations are weak
- Wealth remains the badge of success
- Younger generations are accepting the
  dominance of business and government
  (rebels are tracked and traced)

For Globalisation

- Encouraged, but managed
  by governments in the context
  of disaster management
- Virtual and physical markets
  are treated differently
- Economic growth predominant

For the Nation State

- Traditional focus on nationhood
  in a complex world
- Green technologies are encouraged
  but privatised
- Urbanisation continues unabated

S2

MONEY, THAT'S WHAT I WANT!

(Profit + Chaos)

So much for any ==Damascene== conversion.

This is a world where going back to baking bread, feeding the birds and questioning "the doomsday machine" (Arundhati Roy) quickly gave way to an amplified and accelerated version of what most people experienced before.

It is a world in which everyone craves money, not least because the cost of everything is spiralling out of control due to the impacts of natural systems change, resource scarcity and the operation of free-market principles across every conceivable area of daily life. This includes all public services such as health and education, which are largely operated by global brands focussed on the immediate bottom line.

It is a multi-polar and deeply unstable world where trust in government, media and experts is low, facts are subjective and inequality is high. Outbreaks of anger and rage are commonplace, although such outbreaks are usually short-lived due to laws surrounding physical gatherings. The surveillance technologies have lingered long after the 2020 pandemic ended.

Despite this chaotic backdrop, politicians the world over continue to offer the same short-term solutions, promising future wealth and future stability in return for incursions into individual freedom and privacy today. Such promises are popular, as are strong autocrats, despite the fact that real incomes remain depressed due to the impacts of AI, automation and robotics. Work has become heavily decentralised with contracts typically being short-term, part time or zero hours, a situation made worse by high levels of economic migration exerting further pressure on wages.

However, while global free-markets are still widely embraced, especially digitally, nation states themselves have been weakened by the emergence of a handful of tax-shy mega-companies, many of whom dwarf the countries in which they operate. These organisations are generally free to operate as they wish.

In terms of individuals, they too have been weakened, especially by the harvesting of their data by governments and corporations who work hand in hand to maximise both income and efficiencies even if this is at the expense of individual agency. People therefore tend to focus on their own needs, securing after their own backyards and prioritising individual rights over any collective responsibilities. Empathy is at an all-time low, as is concern for, and investment in, the environment. Societal consensus surrounding the problem is low, let alone any agreement about potential ways forward.

The overall feeling is one of disempowerment and betrayal.

**S2
A DAY IN THE LIFE**

FRED, 17, FROM BLACKBURN, ENGLAND.

I read the news today, oh boy. It was about a lucky girl who got her grades. She got into Cal Tech to study computing. I saw the photograph. That's her sorted. Life in the fast lane. Back in Blackburn things are the same as ever. After the pandemic, everyone reverted to their previous attitudes and behaviours.

No 'changing the business model', no having time to think, no being trusted to work where and when you like, no affordable healthcare. Just endless insecure work, trying to pay the bills and never quite having enough left over to pay for all the things we once got for free (or at least had already paid for via our taxes). I'm up to my eyeballs with debt already. You just have to laugh. It's OK for some, the lucky few that will earn more than enough, and perhaps those, ironically, that had nothing anyway. But, for anyone in the squeezed middle, life just gets harder.

If contending with the 'no limits' behaviour of the sprawling corporate behemoths isn't enough, you also have to worry about what mother nature is going to throw at you next. She is clearly angry, but living with someone on a rampage pays a toil. Mentally it's hard to keep it together. It's the uncertainty more than anything. All the traditional anchor points have gone. It's like being at sea in a small boat in the middle of a huge sea with absolutely no idea where you are or where you are supposed to be heading.

Who do you trust?
What do you believe?
And everyone just looks away.

⟶ *Nobody cares.*

S2
EARLY WARNING INDICATORS

- ☐ Blind faith in economic growth

- ☐ EC survives albeit without the UK as Germany imposes its dominance in Europe for a second time

- ☐ Increasing tribalism and tensions between and within nations

- ☐ Massive and disruptive changes to natural systems

- ☐ Free market forces still operating at full throttle

- ☐ Politics of denial regarding the earth's bio-systems continues to dominate politics

- ☐ Economy and work dominate political discussion and investment

- ☐ Rising East-West division and distrust

- ☐ Growth in digital economy at expense of other areas

- ☐ Empowered individualism still dominant, reflected in the growth of social media and the focus on individual rights

- ☐ Border clashes

- ☐ Populism and radicalisation continue to grow in strength

- ☐ Corporatisation expands its influence into every sphere

- ☐ Trans National Corporations (Apple, Google, Microsoft, Amazon, Facebook etc) are the dominant global players as Nations retreat in their shells and adopt a fortress mentality

- ☐ Impact of climate change on food and water availability

- ☐ Mass migration due to climate change

- ☐ Increasing competition for key resources

- ☐ Privatisation of public data

- ☐ Rising levels of corruption

- ☐ Increasing inequality, anxiety and unrest quelled by surveillance

- ☐ Unemployment, underemployment and workplace disruption

- ☐ Focus on short-termism at the expense of long-term planning

S2
IMPLICATIONS

For National Borders

- Outward migration and especially inward migrations
- Most countries adopting a 'closed' fortress mentality
- Increase in border disputes and feral cities/states

For National Borders

- Rising tribalism and xenophobia (blame culture)
- Increased pressure on devolution within countries
- Digital identities eroding physical/rooted identities (rebels are tracked and traced)

For Globalisation

- Globalisation in full retreat with exception of digital services and the activities of TNCs

For the Nation State

- States under greater pressure in terms of external and internal security, food supply, disease control. Extensive use of protective measures such as currency controls. Potential divergence in terms of regional inequalities.

**S3
SNAPSHOT**

This is a world in which
strong ethical foundations
allow both individuals
and institutions to weather
the storm of natural
systems chaos.

The frequency and severity of droughts, floods,
heatwaves, and storms over the last 20-years has
increased to the point where traditional outliers
have become normal and much the same applies
to human agency. Younger generations have made
inroads into political activism to radically overhaul
attitudes towards climate change, sustainability
and community care. Collaborative and circular
(zero-waste) economies are commonplace and
evidenced by the belief that societies need to
occupy 'middle of the road' positions on all
important matters. Despite this, chaos still reigns.

One very significant change in this world is that for the first time since its inception in early Christian thought, the Golden Rule is at play on a global basis. The idea that we should treat others as we would like to be treated ourselves has long lacked a strong political voice, but global catastrophe has jolted people into a new way of living based not only on empathy, but trust too. This applies as much to the digital realm as the physical. This focus on a balance between economic growth and collective wellbeing has had a strong impact on the funding of education, healthcare, housing and public infrastructure.

Science has benefitted, especially in R&D funding to address clean energy, bio-diversity, water, food, and climate change reversal, but so too have the arts. Ethicists and philosophers have started to sit alongside scientists on committees to bring discussions back to an exploration of how, ultimately, humans should live.

Nevertheless, continuing chaos within natural systems and the human responses to such means that people are not wholly trusting of experts or politicians and even the 'philosopher kings' come under intermittent attack from those that question their wisdom and especially their 'evidence'.

Tribalism is also still strong as a response to anxiety, although the growth in stoic philosophy has gone some way to diluting the worst effects of both.

While it is far from being a utopia, this world is nevertheless moving in the right direction for many. Inequality has been significantly reduced, while representation of younger generations, women and minorities has risen. Nevertheless, new middles classes in Asia, Africa, and the Middle East continually press for further reform and threaten destabilisation and further chaos. But perhaps the biggest challenge of all remains the ever-changing and ever-volatile environment.

Rising demand for resources means that the geopolitical equilibrium is constantly close to collapse, both in terms of natural systems and human governance. Enduring stability is much sought after, but rarely found. Nevertheless, the fact that people and nations alike know where they stand on the major issues and can see a way forwards goes a long way towards mitigating even the worst that mother nature can unleash.
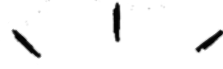
This is a world on the brink.

S3
A DAY IN THE LIFE

**JOSH, 40,
FROM
AUCKLAND,
NEW ZEALAND.**

I read the news today, oh boy. And though the news was rather sad, I just had to laugh when I saw the photograph of the NZ Parliament from the time of Covid-19 with its members, mainly white males over 50, all wearing jackets and ties. Those were the days before the revolution in the conduct of Parliament and the discharge of public office, launched by Jacinda Ardern, had taken hold.

Look at us now!

Fifty-fifty on the gender front; much more multi-ethnic and wearing jeans and casual tops other than on the formal days celebrating our history.

We love what has happened since 2020 but, you know, we live on a knife-edge. It's as if the whole of humanity has got together to chart a sustainable and equitable future only to discover that the natural systems which we are trying our best to manage are unmanageable. We did too little too late some say (especially the scientists who were warning us 50 years ago where we were headed). The politics of human competitiveness is surely being replaced by the politics for survival in a world we cannot control. The re-siting of the United Nations from the New York to Singapore expresses the need for a deep shift in the way we see the world as a fragile organism in need of TLC rather than a Darwinian sphere where it's the survival of the fittest – or should that be the fattest.

Survival in NZ has been relatively easy. We live in a land where the number of sheep and possums outweigh the number of people but the strength of our democratically-based outlook is under pressure from a biosphere that knows no boundaries.

S3
EARLY WARNING INDICATORS

☐ Politicisation of ethical behaviour

☐ Limits to growth

☐ Localisation of attitudes and behaviours

☐ Collective consciousness

☐ Cross-generational activism

☐ Global failure to control climate change

☐ Shift towards community

☐ Balanced view of the role of economic growth

☐ Short-termism in politics as the future looks so uncertain

☐ The internet remains 'open'

S3
IMPLICATIONS

For National Borders

– Migration levels are high, especially out of hardest hit regions
– Nations are generally welcoming to new arrivals: "Come into the ark"

For National Identity
– Identity defined by attitude and behaviour more than rooted in physical place

For Globalisation
– Nations stand together with a few exceptions
– Sustainability limits non-local production of physical goods
– Emphasis on exchange and fiction-less flow of ideas

For the Nation State
– 'Siege' mentality strengthens national resolve
– Tribalism replaced by nationalist pride
– Existential threats continue to glue people and nations together

HERE
COMES
THE
SUN

(Principle + Control)

S4
SNAPSHOT

This is a world where environmental and social concerns trigger widespread systemic change.

The collective near-death experience of 2020 results in a deep questioning of how people want to live. The answers that result say much the same thing. Words such as "differently", "sustainably", "ethically", "locally", and "slower" feature strongly, as does the Scandinavian way of doing things, especially the Nordic model with its idea of paying higher taxes, but receiving comprehensive levels of social care and public services in return.

Investment in areas such as healthcare, housing, transport and education is high, as is the priority given to the health of the planet. In almost all cases, the collective long-term good is placed ahead of short-term individual interests. New governments embrace 'new deals' and unions return to negotiate basic income guarantees offering respite to those most in need, including for older people, although secure employment is another feature of this world.

Obesity and deaths of despair all but disappear over time, while kindness and compassion spread like the virus did back in 2020.   One the one hand peoples' lives could be seen as being more constrained in this world, but having less somehow feels like more. Living more locally has a similar feeling of liberation. There is less pressure and fewer expectations. On the other hand, while there is less desire to express an individual identity, a problem of group think emerges where people are less willing to put forward original or controversial ideas. Nepotism, ineptitude and laziness thrive too in what has become a less measured and less competitive world.

Not surprisingly, cooperation is high, although the focus tends to be on local rather than global matters. Global problems such as climate change, and food and water availability are exceptions and are managed effectively and coherently and large green schemes soak up the large quantities of labour previously displaced by widespread automation.

The concept of rewilding gains momentum as do animal rights. It is now nature, not technology, that has become a religion and people view stewardship of their local environment as their personal responsibility. Clean energy is abundant, especially from air-source heat pumps, wind and solar, and waste is almost non-existent. Key resources also benefit from a mixture of public ownership, fair distribution and pricing that is partly dependent on end use.

Geopolitically, nation states become more important as guardians and profit-seeking multi-national organisations are constrained accordingly. China and the US focus on domestic demand and become less powerful internationally too.

Communities are strong, surveillance is largely unnecessary and the digital realm supports instead of supplants human interaction.

Life is good.

However, storm clouds are looming as the focus on an ethical life leads to concerns about individual freedom and the power of regulators to control people's lives.

S4
EARLY WARNING INDICATORS

- [ ] Common purpose
- [ ] Politicisation of ethical behaviour
- [ ] Sustainability becomes a mainstream issue
- [ ] Governance shift from global/national to local/community focus
- [ ] Significant global reduction in carbon content of energy supply
- [ ] Equal life opportunities
- [ ] Minimum and maximum wages

- [ ] Focus on social well-being in political platforms
- [ ] Reduction in migration
- [ ] Reduction in car use and personal ownership
- [ ] Independent retailers flourish
- [ ] Creation of new global institutions
- [ ] Restraint of technology
- [ ] The Internet is regulated
- [ ] Rewilding of the built environment

S4
IMPLICATIONS

For National Borders

- Nations seek a balanced approach to social and economic border control which gives more emphasis to humanitarian issues rather than the purely economic (refugees are welcomed)
- Borders define national identity as a positive social good

For National Borders

- Citizens under forty are seen as the shapers of our culture as longevity increases
- 'We' not 'Me' culture
- Asian growth economies focus on internal policies
- The local Arts are given more emphasis in cultural policies

For Globalisation

- Re-emergence of 'Glocalisation', an adaptation of the free flow of goods and services across national borders which are aimed at community advancement
- TNC's are more highly regulated, especially as tax-payers in the countries they trade in

For the Nation State

- Shift from free market to social capitalism (free education, health and public transport in return for higher taxation) as Governments regulate TNCs and rebuild the public sector (Adoption of the Nordic economic model)
- Investment in local manufacturing and local urban development
- Growth of trust in surveillance and information control
- Opt-outs to control technology and invasions of privacy

**5.
STRATEGIC
TRANSFORMATIONS**

**THE QUEST
METHODOLOGY**

Five distinctive
but inter-related
phases

The work we have done delivers some rich material for the way in which the external environment may shape alternative futures going forward to 2040. The Q E S steps from the scenario process.
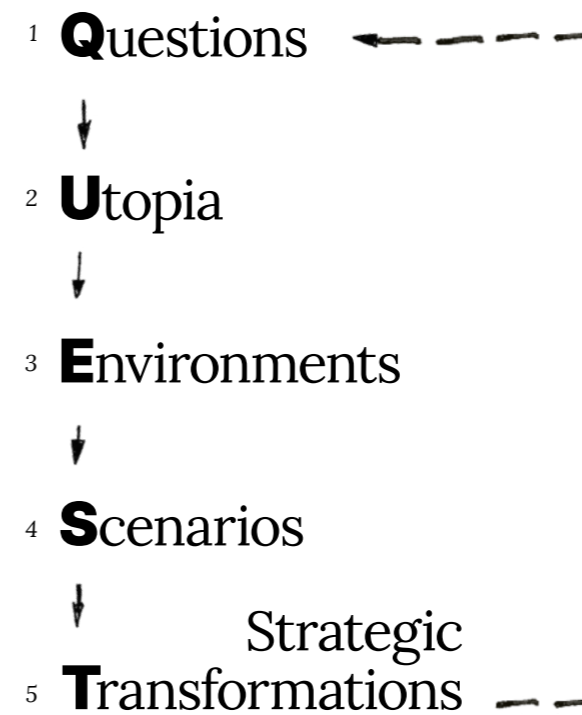
We now invite you and your colleagues to join with us in building a set of strategic implications and options suggested by the scenarios that are relevant to your current planning processes. We may initially design a preferred future with you (the U in QUEST) so you have an up to date vision statement as an integral part of the process.

You may also wish to focus on brand development or other strategic aspects; that is up to you. The framing questions (Q) are always a movable feast.

What is essential is to move from a passing interest in the scenarios we have developed to a passionate concern for the future of your organisation and strategies that need to be integrated now into your organisational planning.

1 **Q**uestions

2 **U**topia

3 **E**nvironments

4 **S**cenarios

Strategic

5 **T**ransformations

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Please contact **Wayde Bull**
on XXXXXXX if you would like
to come with us on the road
from risk and uncertainty
to a foresight-based future.

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