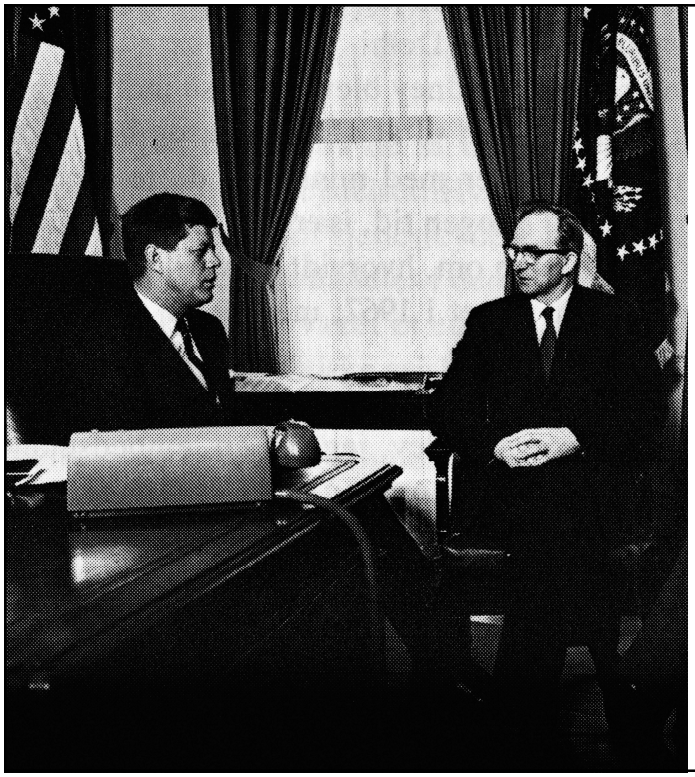
1



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Global Independent Advisors since 1969.

Institute for Futures Studies is a non-profit, independent institute founded in 1969 by former OECD Secretary-General Thorkil Kristensen for the betterment of our society.

The vision of the Copenhagen Institute for Futures Studies is to reduce complexity and advise decision-makers about the future, enabling them to make the best possible decisions in the present.

2

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SELECTED CLIENT AND MEMBERS
Copenhagen Institute for Futures Studies.

MAERSK · IKEA · RICHEMONT · novo nordisk · Danske Bank · PANDORA
Vestas · new balance · United Arab Emirates Prime Minister Office · BAUHAUS · ISS · Roche
Lowe's Improving Home Improvement · State Farm · Volkswagen · TOYOTA · PICTET 1805 · SWAROVSKI
Bayer · Adecco · Ørsted · VELUX · Benjamin Moore · Statoil
LEGO · PFA Pension · novozymes Rethink Tomorrow · Deloitte. · SIEMENS · Roskilde Festival
Estée Lauder · Designit · Ministry of Defence · GRUNDFOS · NRK · UNDP

3

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Megatrends

…why bother?

4

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WHAT WE THOUGT IT WOULD LOOK LIKE

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According to DST, today there are 37 different types of family constellations

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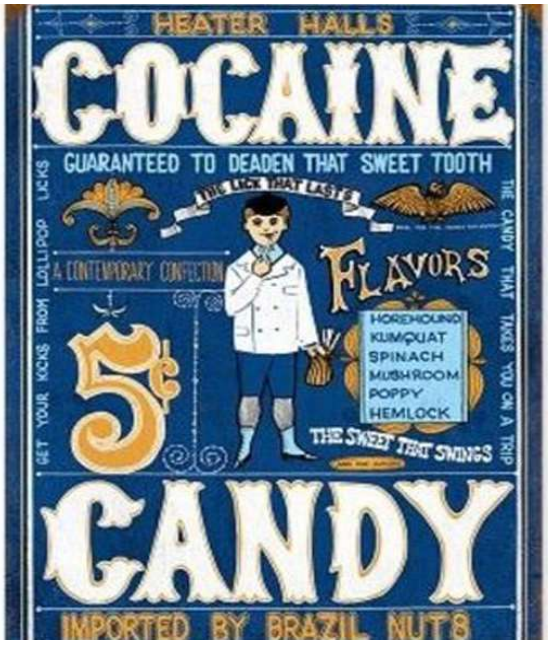
Social trends matter - in mid 20th century they supported a future giant



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IN 1946, THE RJ REYNOLDS Tobacco Company initiated a major new advertising campaign for Camels

"More doctors smoke Camels than any other cigarette."

This phrase would be the mainstay of their advertising for the next 6 years.

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"I think there is a world market for maybe 5 computers"

Thomas J. Watson, Chairman of IBM, 1943

Knowing is not understanding…

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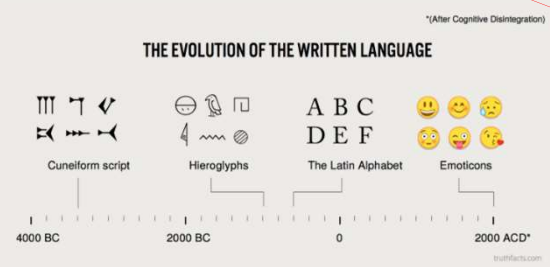
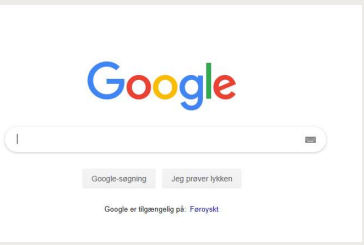
IS 30 YEARS REALLY THAT LONG?…





(Kilde: https://twitter.com/pvermeul_peter)

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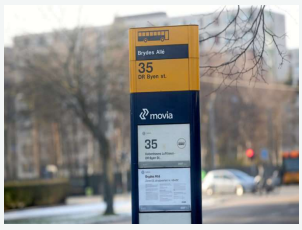
…AND CLOSER TO HOME



The bridges, Nordhavn, metro, digital infrastructure in our daily lives

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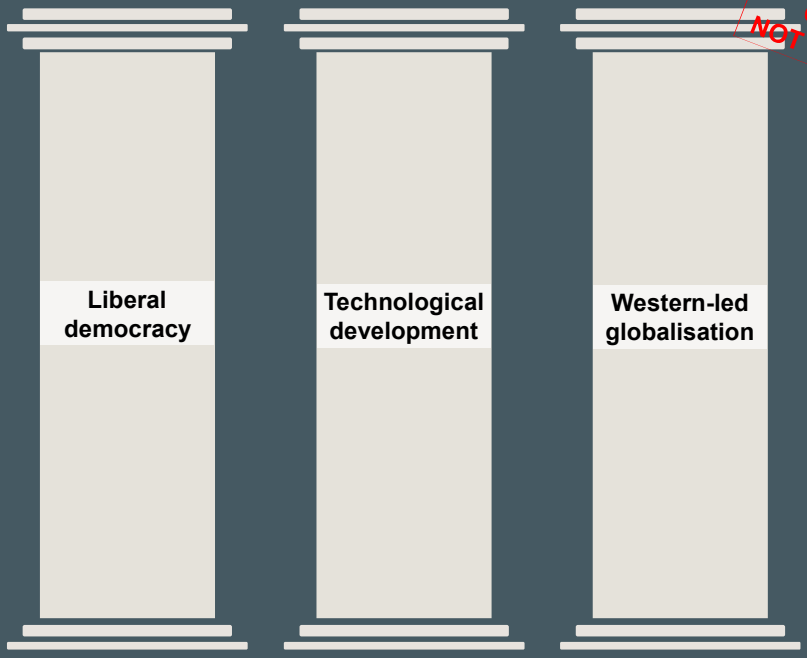

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Denmark 2019 – parliamentary election

I will be voting!
I will be debating online and in public!
I will protest if I disagree!

Because I live in a liberal democracy

14

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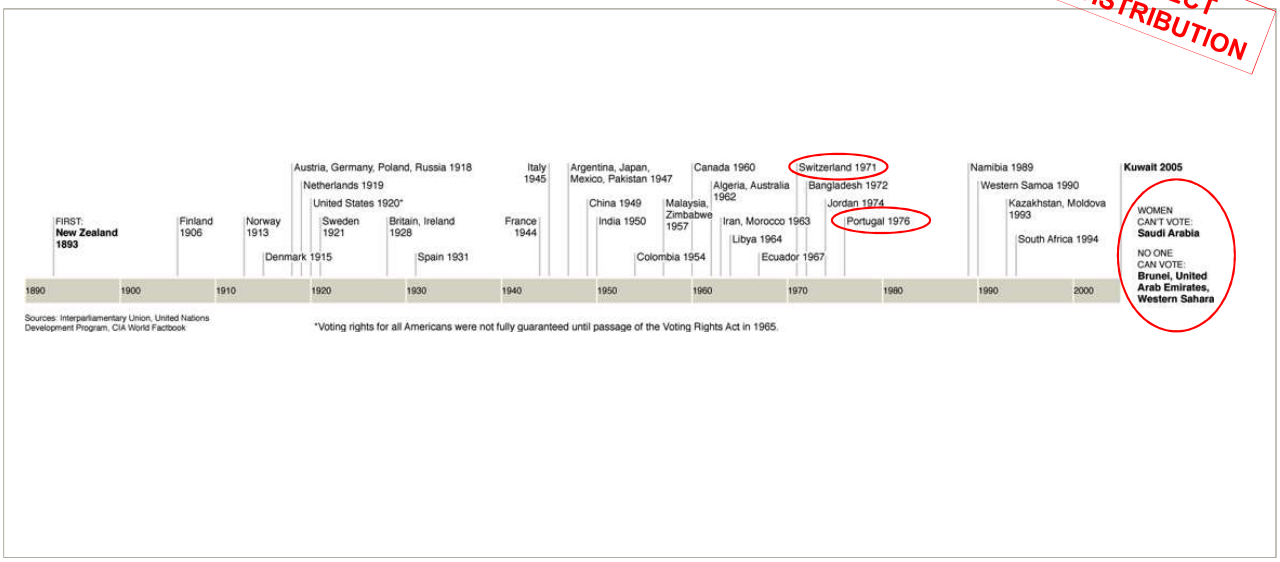
In a not so distant past – women's voting rights as a proxy



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The world is global and recognisable

Because it is globalised in our image

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We have every reason to think we will lead Industry 4.0

Because we have led since the steam engine and invention of the light bulb

17

Tomorrow's World Today

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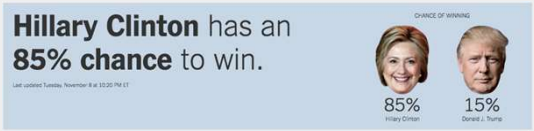
BUT THINGS CAN CHANGE VERY QUICKLY….WE DIDN'T SEE IT COMING…OR AT LEAST WE DIDN'T WANT TO SEE IT

Huffington Post's final presidential forecast

FiveThirtyEight

EU referendum outcome probabilities

New York Time's final forecast



A natural question arises, what else are we choosing not to see?

18

Western-led globalisation

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1950 – 1970s
- Industry 3.0
- European Union

1920– 1940s
- Maersk container ship left for its first voyage
- International Monetary Fund (IMF)
- Bretton Woods agreement – USD as a global currency

1980 – 1990s
- Fall of the Iron Curtain
- Amazon.com launched online shopping
- The Economist published The Big Mac Index
- World Trade Organisation (WTO)

2000s
- China joins WTO
- Facebook went online
- Global exports reached a milestone of 26% of global GDP
- Egyptian McDonald's serving McFalafel

Rise of far-right populism

2017
Trump presidency

Weakening of Western-led international institutions

US walked away from
- the Paris agreement
- the Iran Nuclear Deal
- TPP and TTIP

Belt and Road Initiative

Asian Infrastructure Investment Bank - the first financial institution on such a scale that does not have the US as a founding member

19

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We have never been so interconnected

21

Tomorrow's World Today

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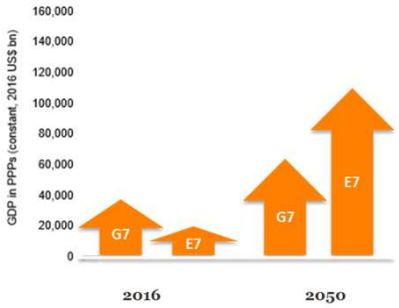
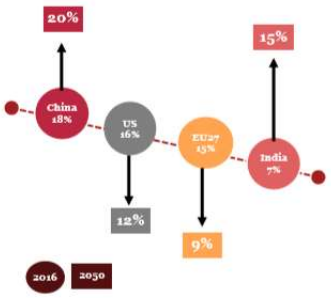
Global averages are deceiving

…Indonesia will surpass UK while Egypt breathes down Italy's neck

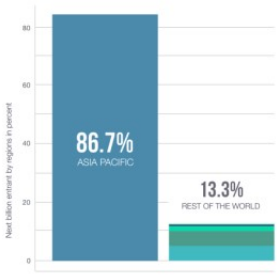
The 'E7' will overtake that of the G7 by 2050



US and Europe losing ground to China and India (share of global GDP 2016-2050)



>85% of the next billion middle-class participants will be in Asia



(Source: PWC)

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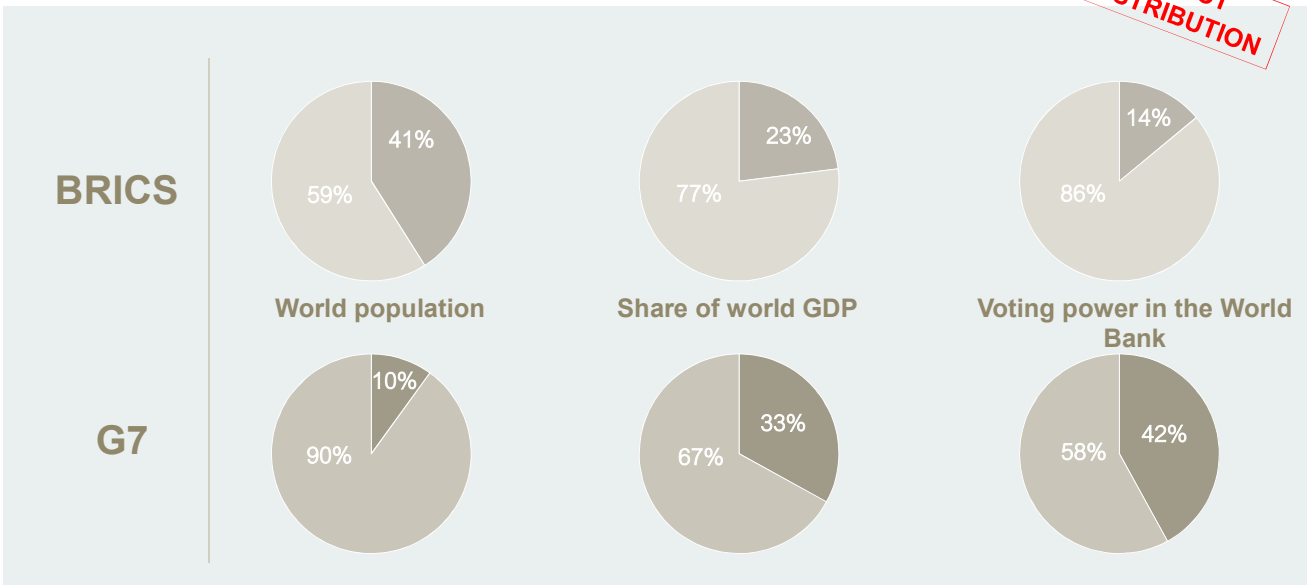
Outdated world – somethings gotta give



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One Belt One Road

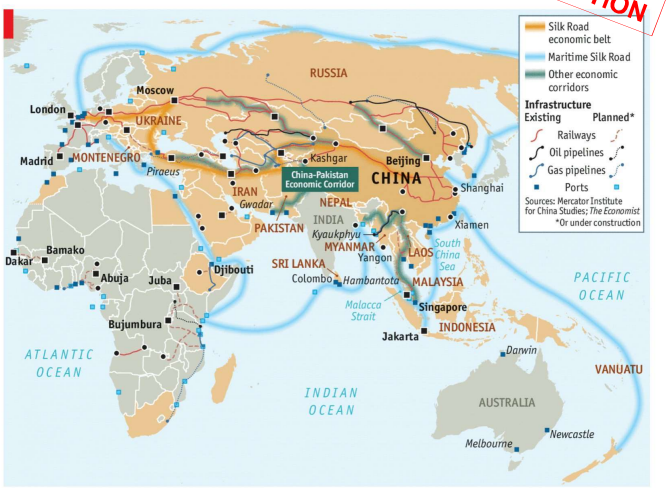
The 'new Marshall aid'…10 fold…with strings attached?

Significant investments in

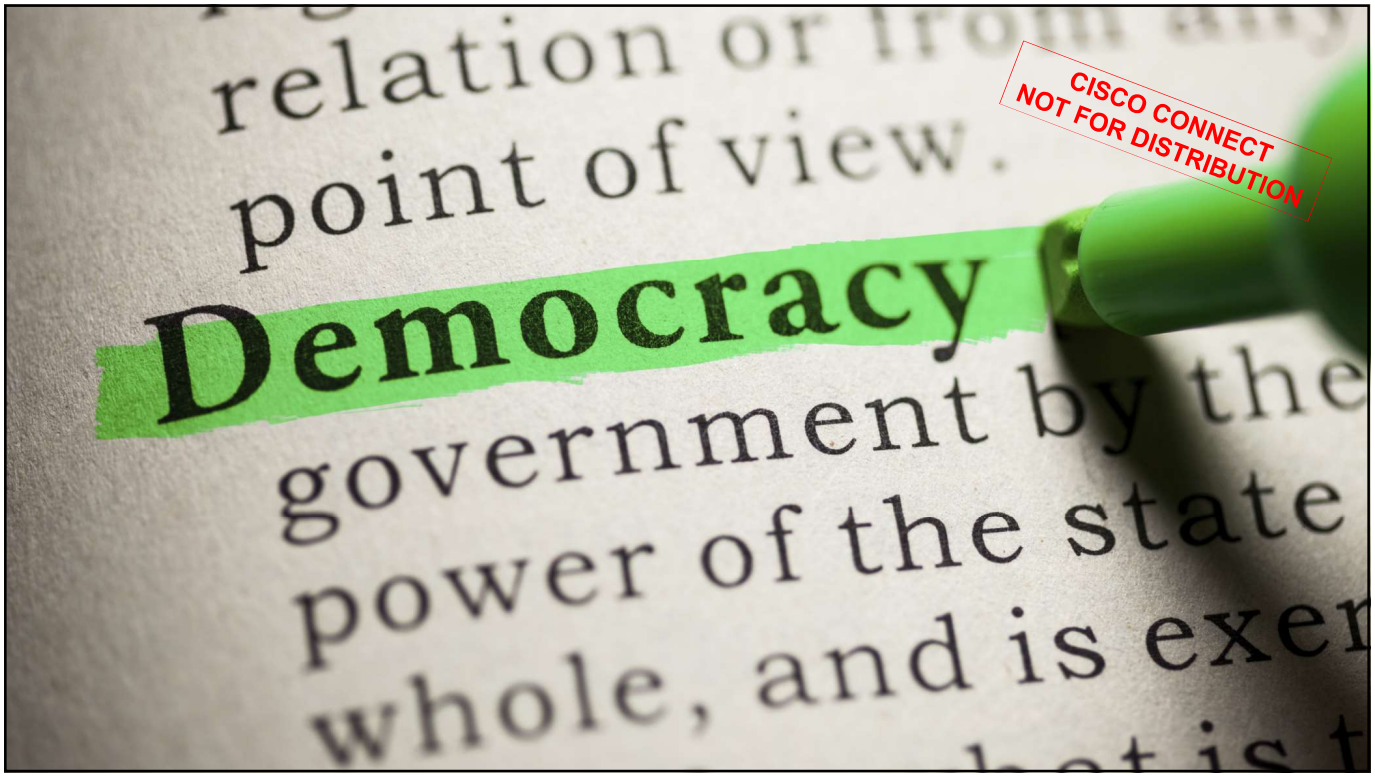
- Interconnected roads
- Dams
- Ports and freight terminals
- Railways
- Energy pipelines and power stations

China to strengthen its superpower position and be able to influence Central Asian economies and their trading patterns.

ESTABLISHING OWN INSTITUTIONS



The Economist


relation or from
point of view.
Democracy
government by the
power of the state
whole, and is exer
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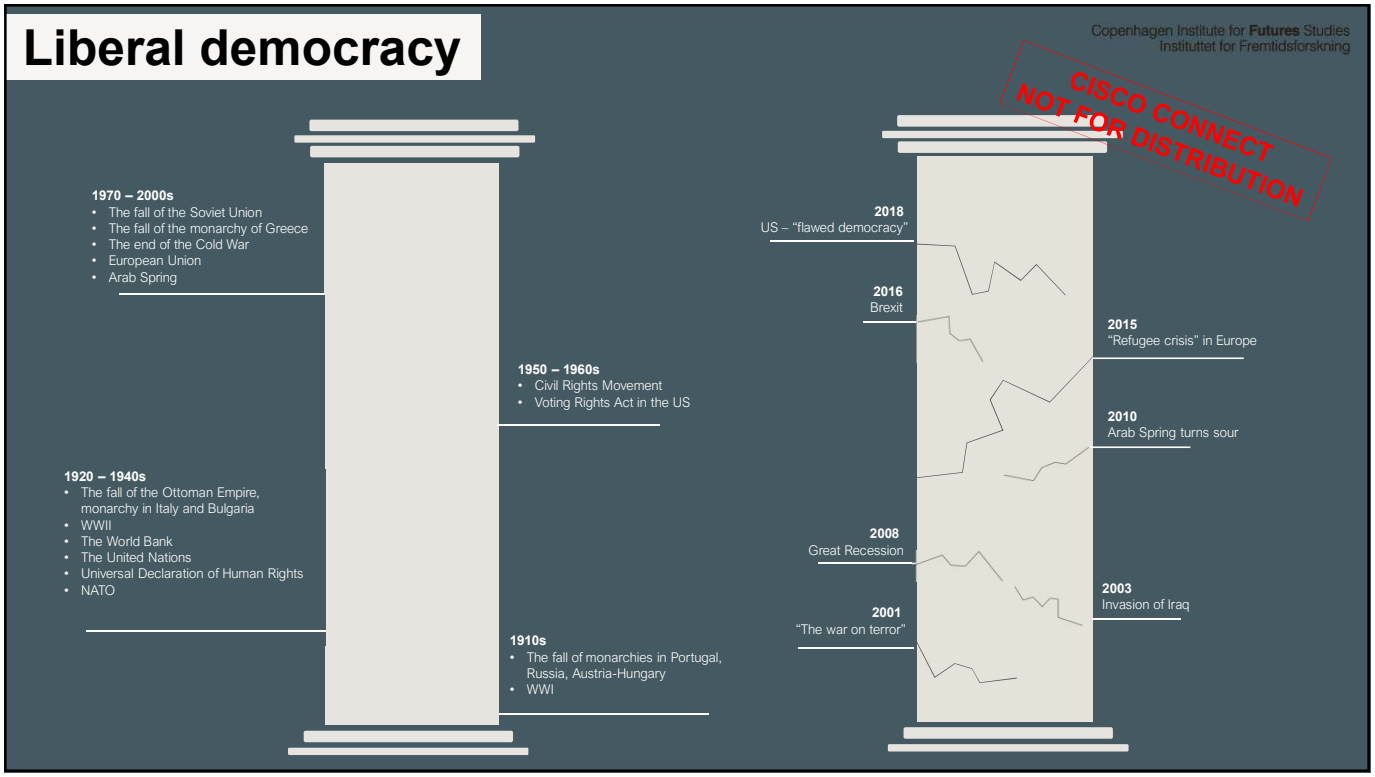
Liberal democracy
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1970 – 2000s
• The fall of the Soviet Union
• The fall of the monarchy of Greece
• The end of the Cold War
• European Union
• Arab Spring
1950 – 1960s
• Civil Rights Movement
• Voting Rights Act in the US
1920 – 1940s
• The fall of the Ottoman Empire, monarchy in Italy and Bulgaria
• WWII
• The World Bank
• The United Nations
• Universal Declaration of Human Rights
• NATO
1910s
• The fall of monarchies in Portugal, Russia, Austria-Hungary
• WWI
2018
US – "flawed democracy"
2016
Brexit
2015
"Refugee crisis" in Europe
2010
Arab Spring turns sour
2008
Great Recession
2003
Invasion of Iraq
2001
"The war on terror"

26

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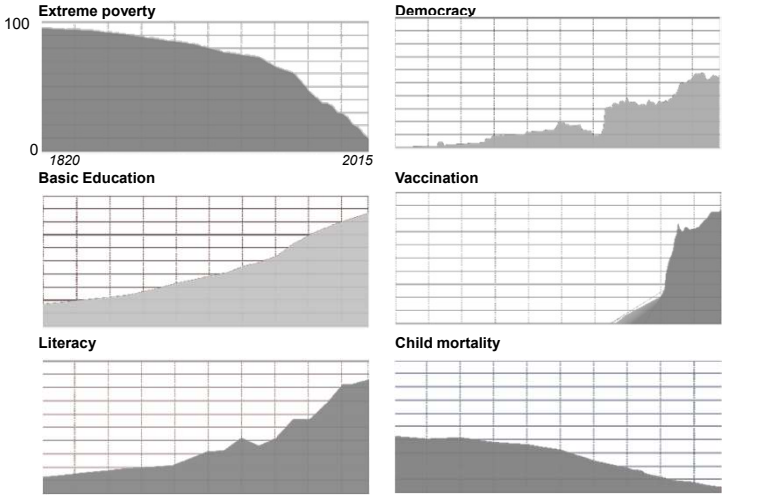
The have also never been safer

We feel unsafe in the safest world we've ever had

"Violence has been in decline over long stretches of time and we may be living in the most peaceful time in our species' existence"

Professor Steven Pinker, Harvard

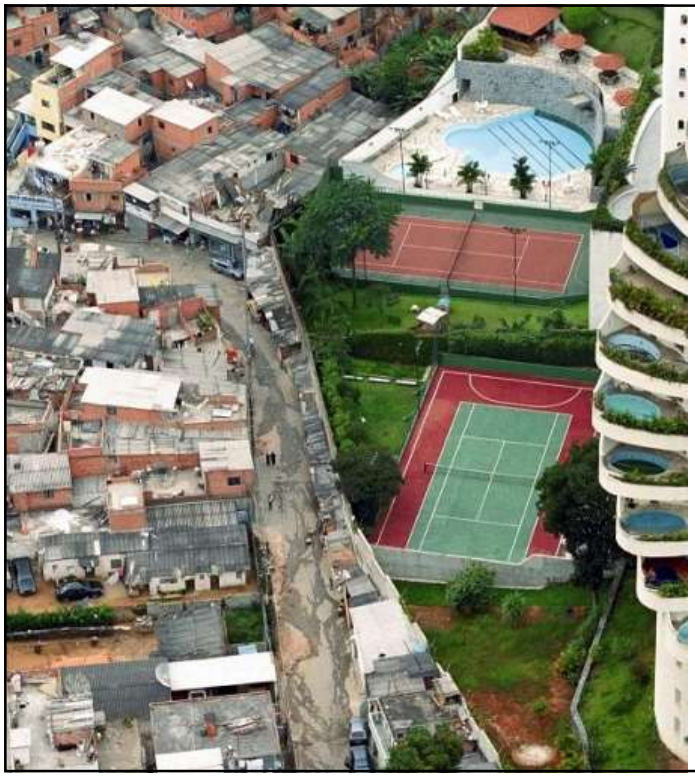
The world as 100 people 1820 - 2015



Pinker, 2018

27

28



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Polarisation

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Polarisation rising internally

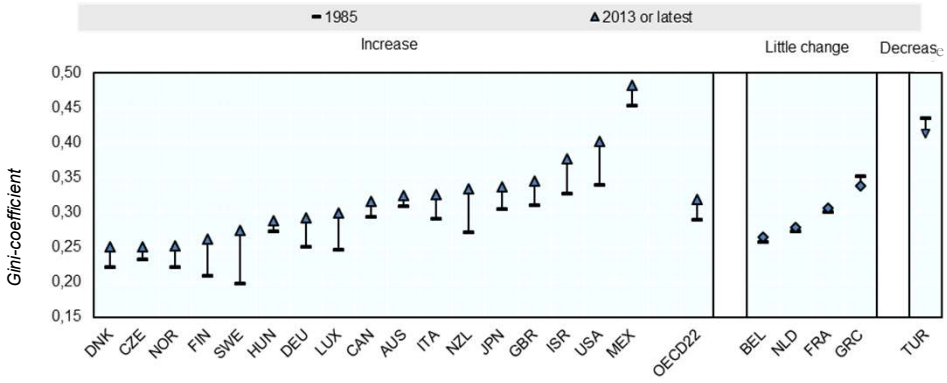

Figure: Gini coefficients of income inequality, mid-1980s and early 2010s
Gini coefficient of zero expresses perfect equality, where all values are the same, a Gini coefficient of one expresses maximal inequality among values

(Sources: OECD: Why Less Inequality Benefits All, 2015)

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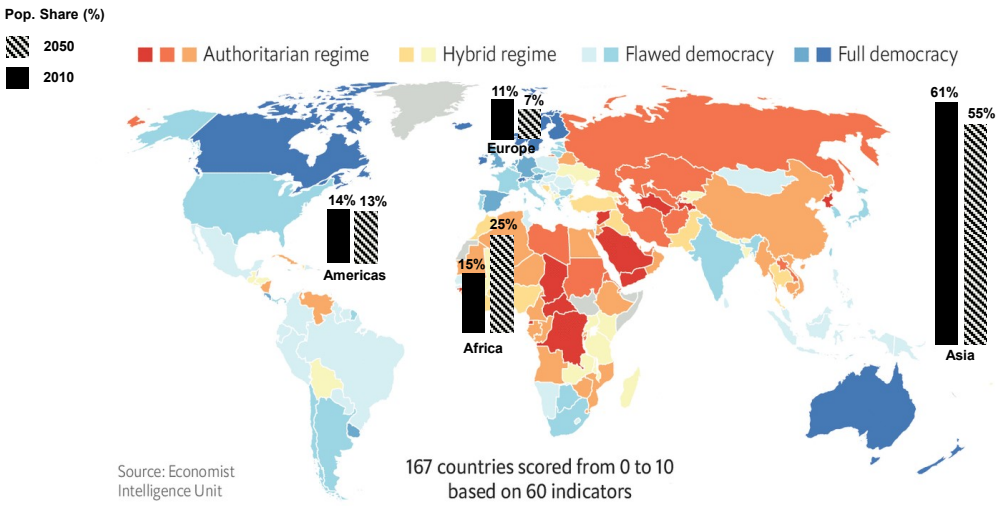
BUT THE DEVELOPMENT IS TURNING INTO A DEMOCRATIC RECESSION - DEMOCRACY INDEX 2018

And if people and institutional tradityion are any indicator at all, then it looks to deteriorate further



Source: Economist Iintelligence Unit

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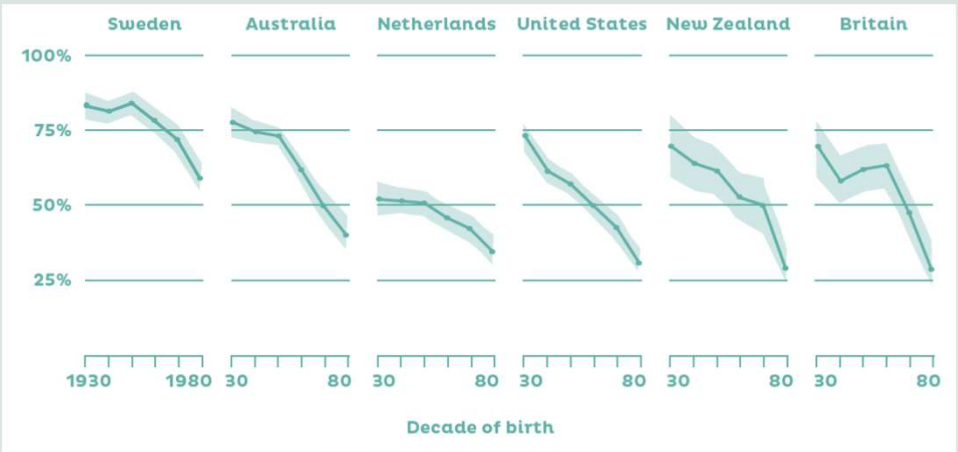
PERCENTAGE OF PEOPLE WHO SAY IT IS "ESSENTIAL" TO LIVE IN DEMOCRACY



Source: New York Times 2016

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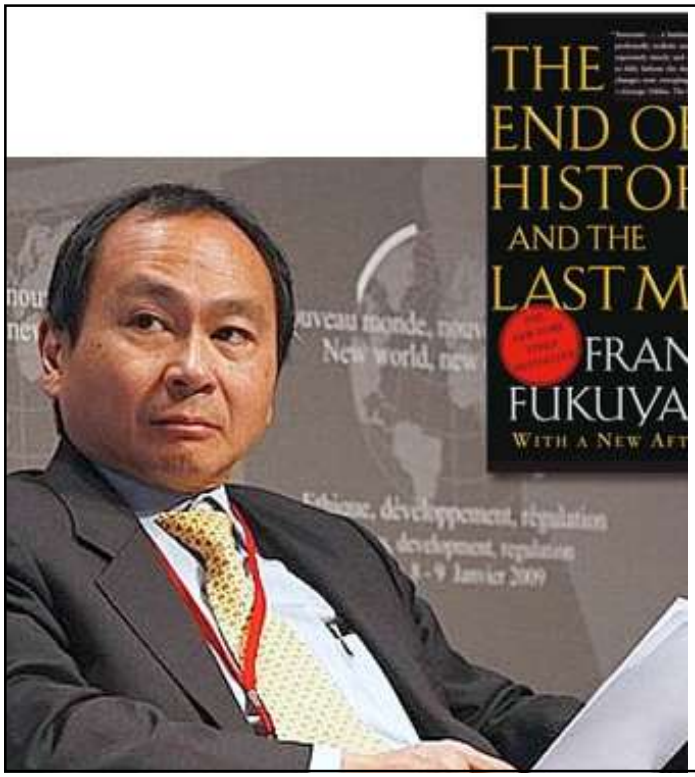

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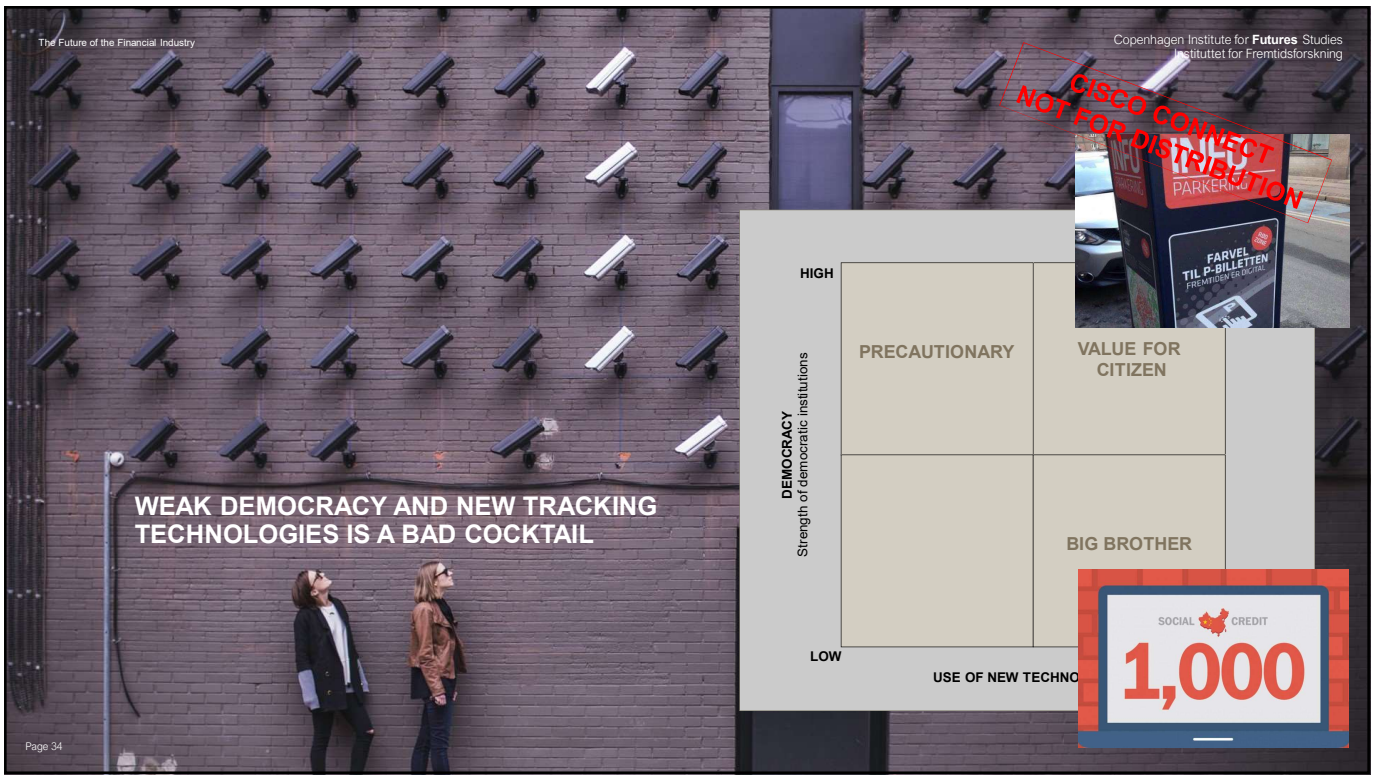
"… if China manages these stresses and remains strong and stable for another generation, then I think there is, in fact, a real alternative to liberal democracy."

Frank Fukuyama

33



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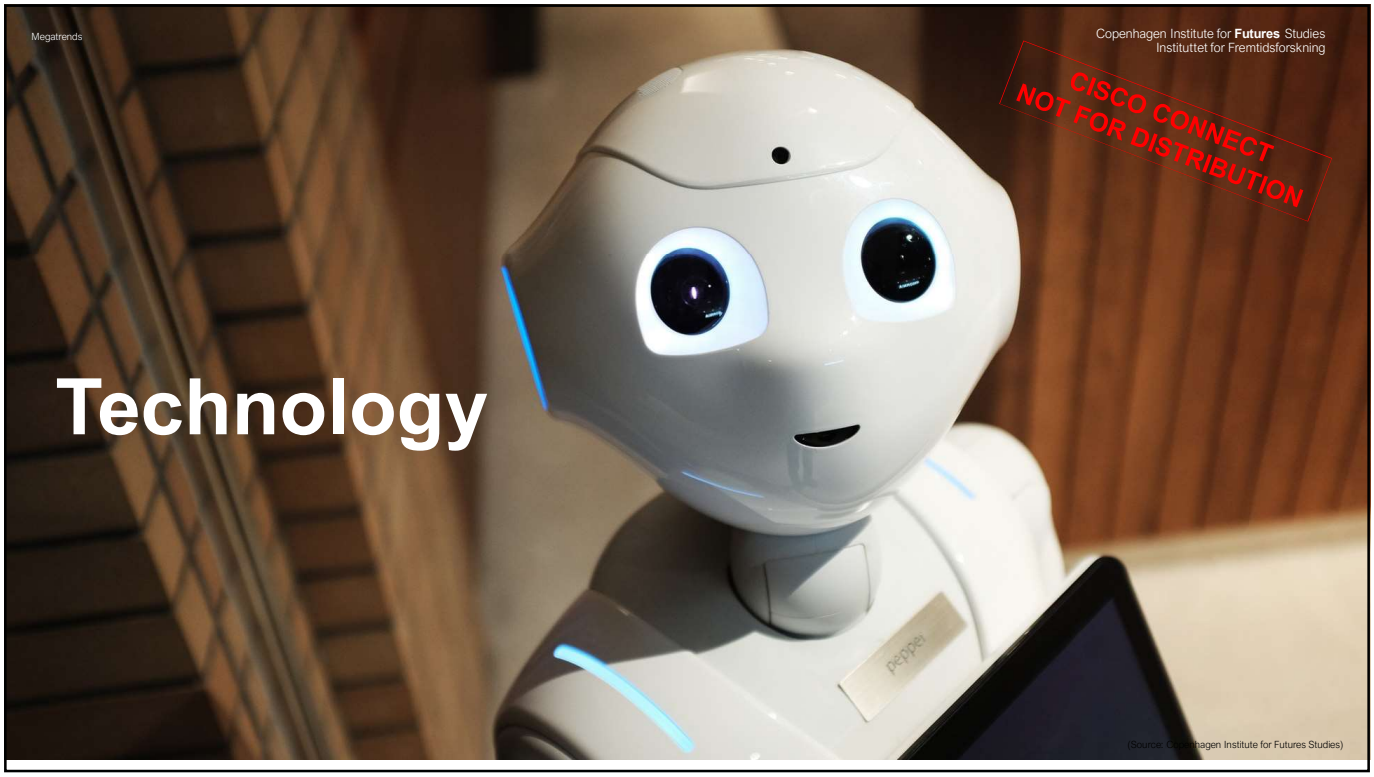
Technology



(Source: Copenhagen Institute for Futures Studies)

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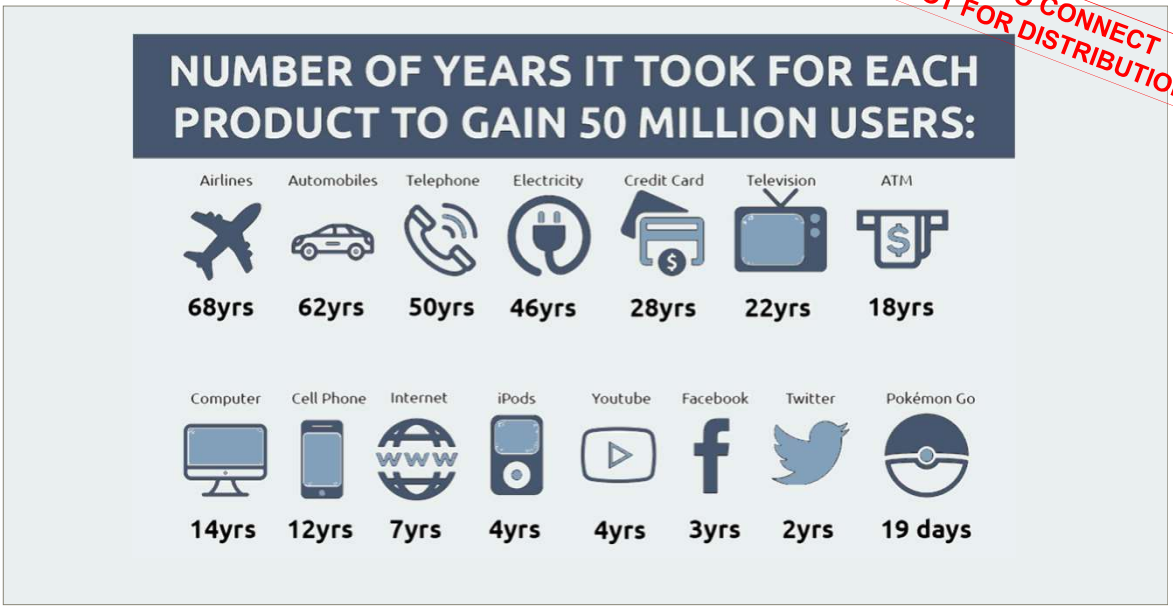
ACCELERATION IS THE NEW NORMAL



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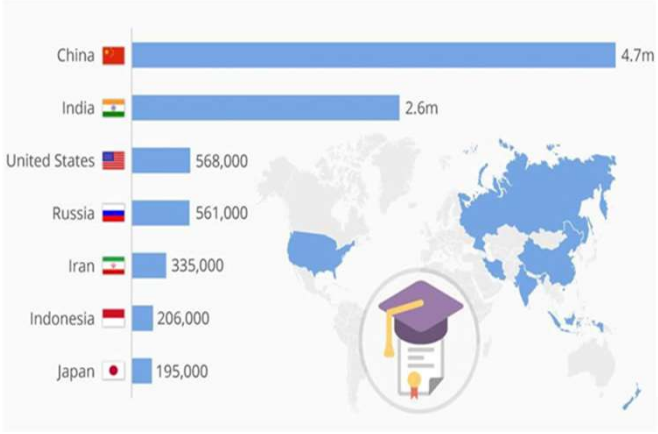
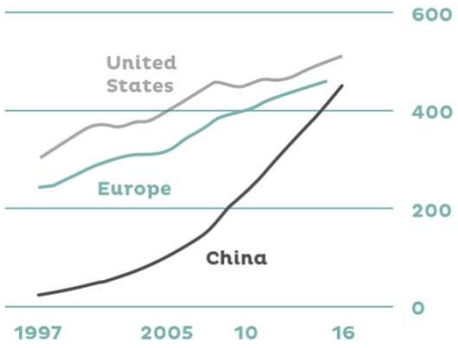
FIRST YOU NEED THE IDEAS - THEN YOU NEED THE FUNDING

Countries with most STEM graduates



R&D Spend



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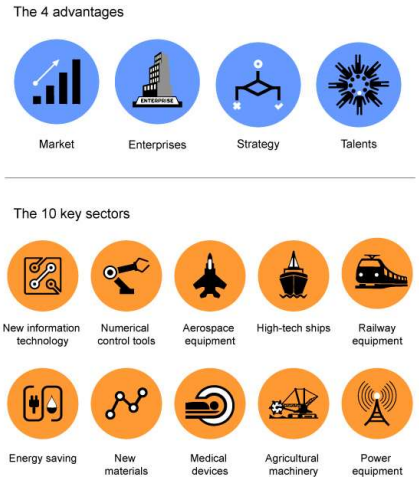
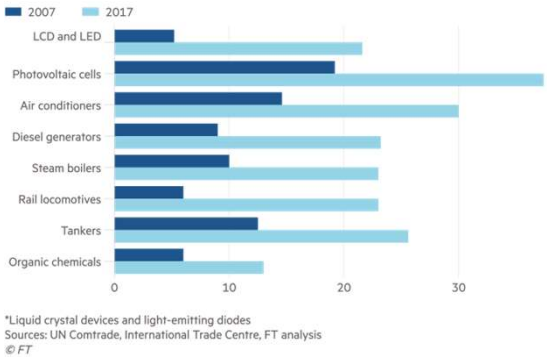
AND FINALLY ENABLING REGULATION - MADE IN CHINA 2025

China surpassed Japan's electronics exports in 2014, who's next?

Made in China 2025



China gains share in tech exports (% of global)



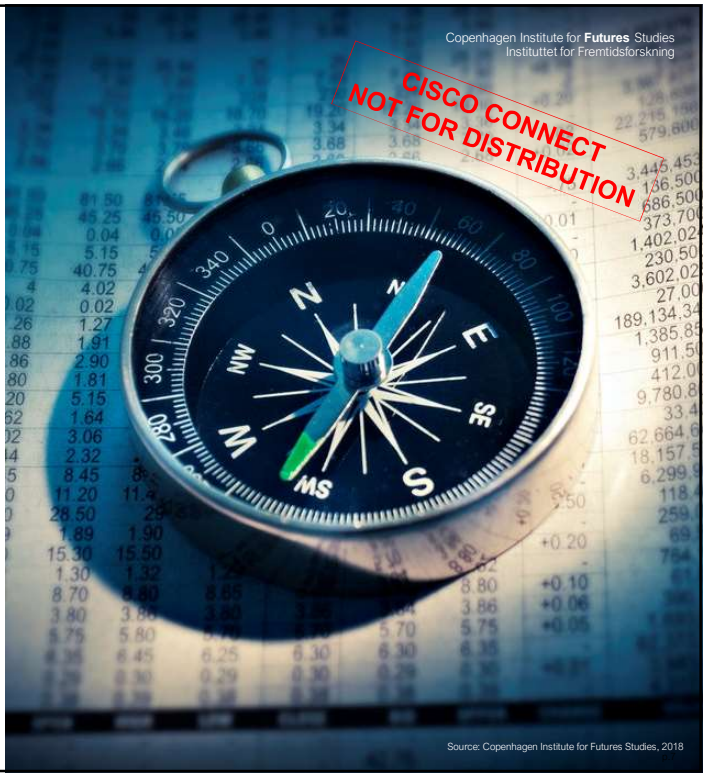
*Liquid crystal devices and light-emitting diodes
Sources: UN Comtrade, International Trade Centre, FT analysis
© FT

In pursuit of a course

In 1980, Shenzhen was a fishing village of **30,000 people**.

Today, it produces 90% of the world's electronics and is home to over **12.5 million people.**

It has **3 million** registered businesses. It is compounding its growth at **>12% p.a.,** doubling in the last six years.



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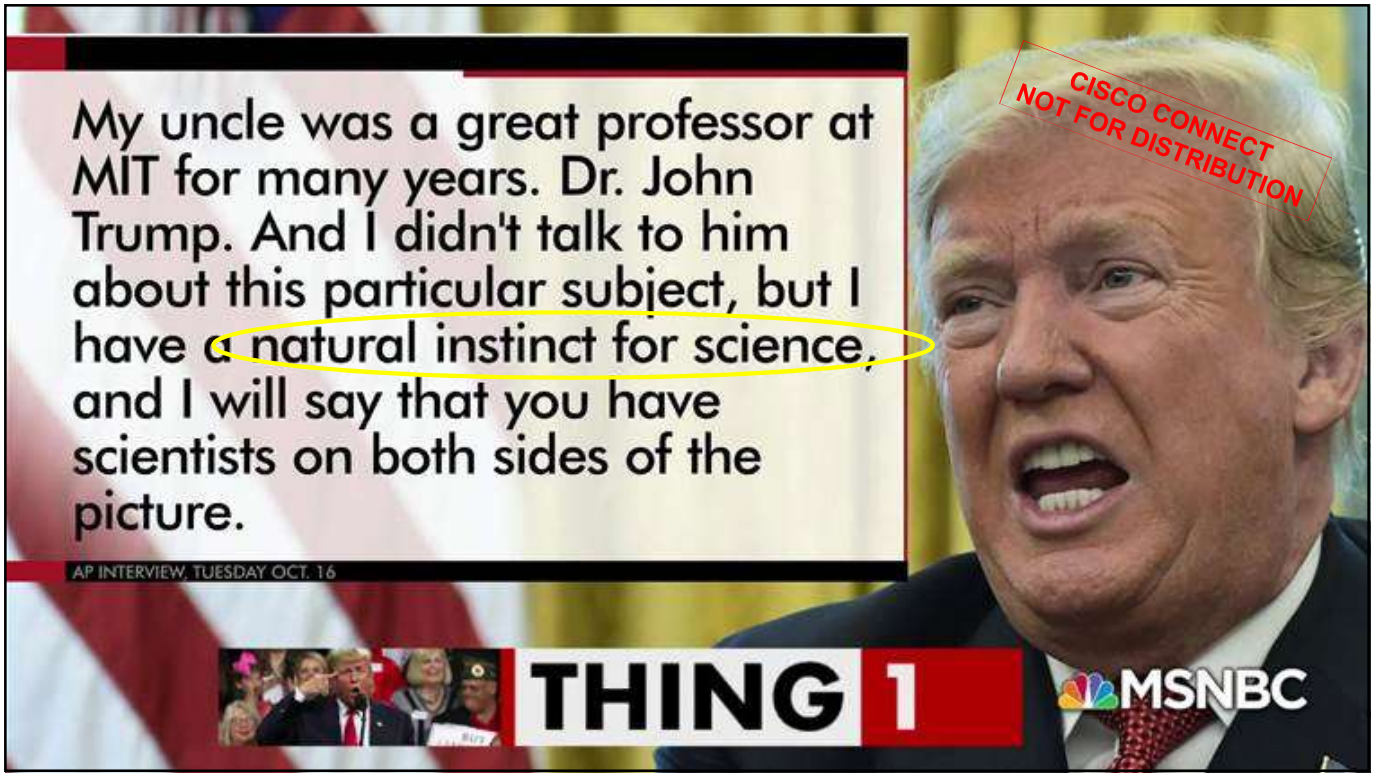

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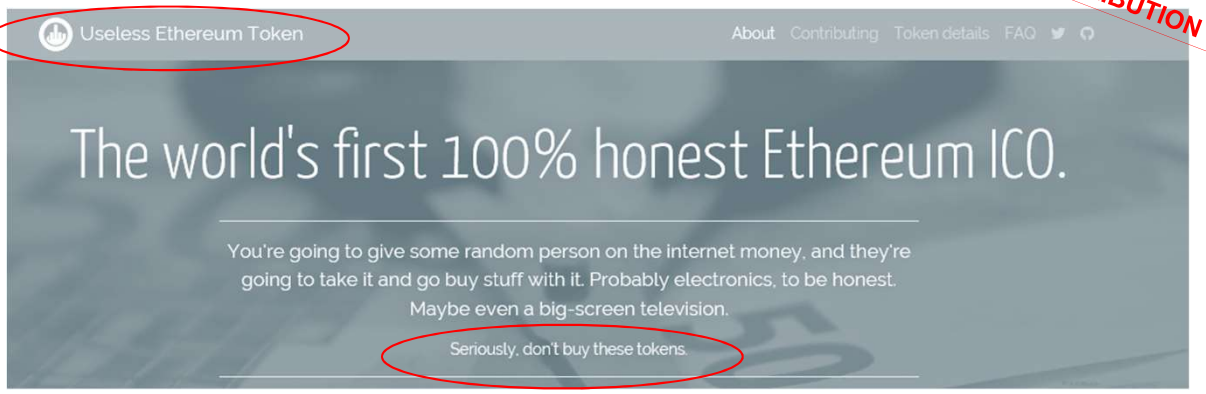
RECENT HYPES – BITCOINS? BLOCKCHAIN?



It still raised USD 300+ K 😮

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POLITIKEN
Internationale afsløringer: Paradise Papers går kloden rundt

FINANCIAL TIMES
Danske: anatomy of a money laundering scandal

FINANS
Spekulanter og storbanker har plyndret Danmark og andre europæiske lande for milliarder

Edelman

AN IMPLOSION OF TRUST

The New York Times
Cambridge Analytica and Facebook: The Scandal and the Fallout So Far

The Washington Post
A new study suggests fake news might have won Donald Trump the 2016 election

DR
Svindelsag om Britta Nielsen bliver til teaterstykke

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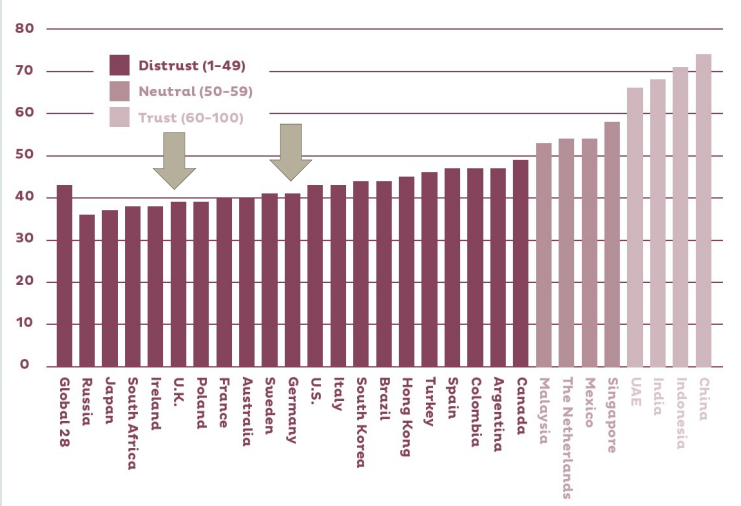
EDELMAN TRUST BAROMETER 2018



Source: Edelman Trust Barometer 2018.

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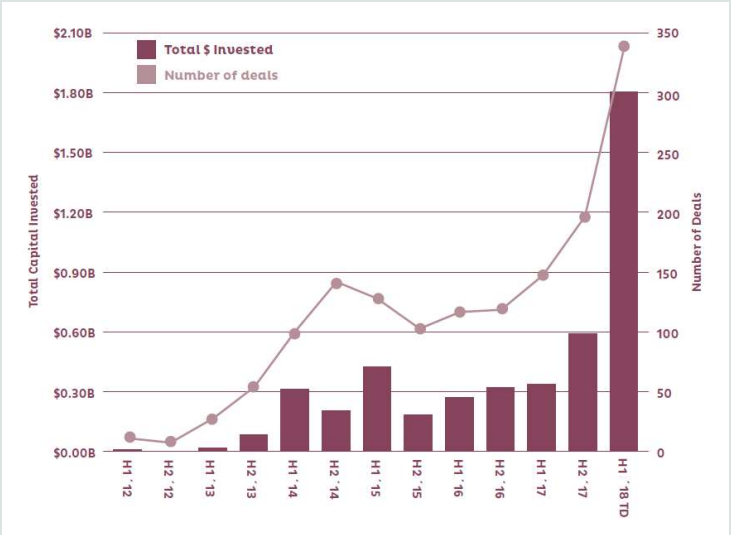
WORLDWIDE VENTURE INVESTMENTS IN BLOCKCHAIN AND BLOCKCHAIN-ADJACENT STARTUPS



Source: Techcrunch (2018), opdateret af IFF.

Tomorrow's World Today

U.N. glimpses into blockchain future with eye scan payments for refugees.

Thousands of refugees in Jordan's Azraq camp don't pay for their food by a scan of their eyes.

Purchases are then recorded on blockchain.

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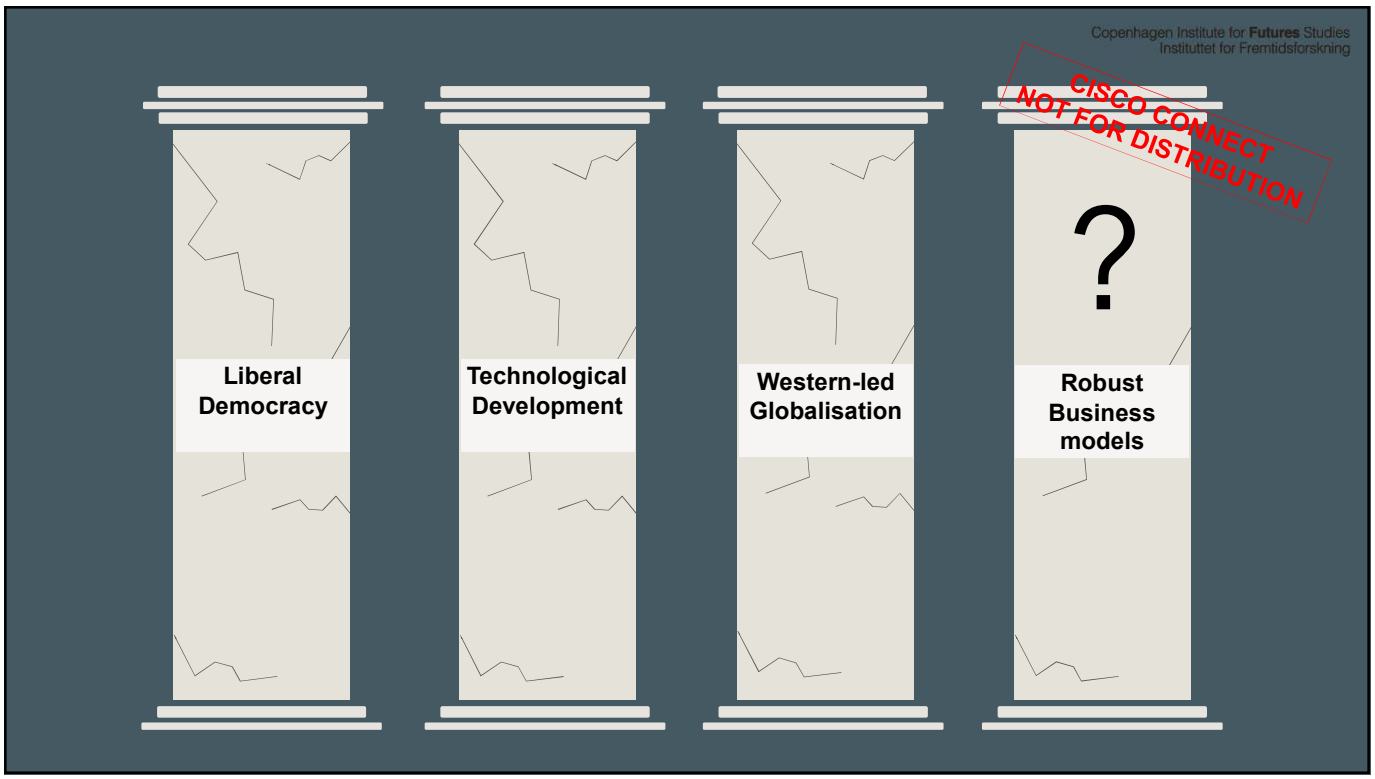

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