

# **BRAND NEW WORLD. REINVEN- TED**

People, Business, and Brands in the New Reality  
of the 21st Century: Strategies of Survival and Development

Made with Love and Faith in the Future  
by Electric Brand Consultants x Presium

Made with Love and Faith in the Future

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# ELECTRIC

Brands do much more than differentiate organizations and products, they serve as monuments to the epoch that gave them birth. Creating them we have to understand the historical perspective and feel the zeitgeist in order for brands to resonate with minds and hearts of their audiences. That is the core of Electric Brand Consultants strategic approach and that is especially relevant in crucial times like today.

Throughout the history it was the great disturbances that changed the paradigm and made people re-evaluate their worldview and their relationships with their surrounding. Epidemics have always been especially influential: their causes were unknown and were considered as retaliation for the wrongdoings of people and their masters. Not once they swept the world taking the lives of millions, becoming the turning points of history.

The Black Death in the XIV century anticipated the coming of the Reformation, while the plague of the second part of the XVII — first part of the XVIII century inspired the Enlightenment that was marked with the growing interest to natural sciences. The First World War preceded the pandemic of the Spanish flu that quickly outnumbered the war by body count. The two successive events defined the social, cultural and political agenda in the world for the most part of the XX century.

The COVID pandemic has been called the first infodemic in history — due to the controversial role that the traditional and new media played while it unfolded. Being the most powerful elements in the media landscape, brands need to engage in the fight with the new threats facing the world today. That is why we in Electric Brand Consultants look closely at the current events and want to share our insights with you.

We hope that our observations and conclusions will help you build a successful strategy in a fast-changing world we live in.

**Beso Turazashvili**

**CEO and founder, Electric Brand Consultants branding and communications agency**

# PRESIUM

Dear friends!

We are glad that this report has fallen into your hands. Many of your questions may have found answers in this research. Was the coronacrisis utterly unexpected or was it a consequence of certain actions? What has changed our world in the past 20 years and how? Is our life better than it used to be?

In this research we have tried to present a picture as exhausting as possible of what had happened to the world in the latest decades and to provide insights from key opinion leaders — scientists, musicians, entrepreneurs, managers of corporations and others.

We hope you will enjoy the work we have prepared.

**Ilya Galushin**

**Partner, Head of foreign division,  
Presium studio of visual communications**

Part 1

# MEGATRENDS THAT LED US HERE



# HUMANKIND FOUND ITSELF ON THE THRESHOLD OF A NEW REALITY

A little more than twenty years ago, people around the world were looking forward to the new Millennium with excitement and hope. Optimism and anticipation of freedom that was about to set in on the planet were in the air. The Shakespear in Love triumphantly won an Oscar and beat box office records while Ricky Martin's Livin' la Vida Loca became an ear catcher. In the American movie Armageddon, Lev Andropov helps Harry Stamper prevent an asteroid's fatal impact on Earth.

And now we are in the beginning of the third decade of the new Millennium. We witnessed the 9/11, the advent of Facebook and iPhone, China's rise, 2008 financial crisis, 2012 doomsday, and the US elections in 2016 (another doomsday according to many). Korean movie Parasites became a blockbuster in 2019.

Over the first two decades of the 21st century we were amazed by the advance of technologies, socio-economic shifts, business tycoons and small knots of politicians revamping lives of entire continents and our own.

**Suddenly in the twenty first year of of the century — like an end of semester test — the world faced an unprecedented challenge of the coronavirus pandemic; everyone without any exception has to look for answers to this test now.**

**Today, each of us wonders what comes next and what one should do now. How to get prepared for the future?**

Amid the global coronavirus infodemic, these burning issues seem unsolvable. Many of the sectors that just yesterday seemed somewhat solid and stable (such as energy market and tourism sector that used to post record gains year after year), today care only of the ways and means to stay afloat. How can anyone be sure of anything now?



# **INFODEMIC IS AN INFORMATION “VIRUS” THAT INFECTS PEOPLE WITH PANIC THROUGH THE OLD AND NEW MEDIA USING FAKE NEWS AND SHOCKING HEADLINES.**

Yet, the race is got by running. For many years, we were conducting studies for companies in various sectors, observing trends that impacted them, comparing and making conclusions. Although the current situation is unstable, it has given us clues to the questions that have been accumulating for a long time, and we would like to share them with you.

Through the retrospection method, we singled out two megatrends that shaped up the world before the coronavirus outbreak, gave rise to the phenomena occurring today, and would determine the range of possible consequences.

Each of these has already had a strong impact on the social, political, and economic agenda; and their combination gave rise to an unprecedented situation of the global imbalance between regions, countries, and people that puts humankind's development in the turbulent 21st century in jeopardy.

# MEGATRENDS ALREADY SIGNIFICANTLY CHANGED OUR WORLD OVER THE LAST DECADES

**By megatrend we mean a trend that is global and long term and that determines quantitative parameters of global development. The concept of megatrend has been introduced relatively recently, in 1982, by futurist John Naisbitt. This phenomenon is new because it could arise only at the current level of globalization.**

Opinions on the number and substance of megatrends may differ; however, we chose two of them the combination of which, we believe, is fundamental for the current situation. These megatrends are related to demographics and advancements

in technology. Today, they clash directly and determine economic, social, environmental, and political phenomena in the present day world.

## Demographic shifts

# 1

1 Global population has been growing faster than ever, and we still don't know what to do about it.

## Technology development

# 3

3 Digitalization is changing the labor market structure and mankind is approaching an existential crisis

Global changes

# 2

2 Global migration is accelerating and expanding onto ever new regions while debates about migrant adaptation continue.

# 4

4 Amounts of information are growing manyfold; we get more data than we are able to process

Changes at the levels of a community or a person

Part 1.1: Socio-demographic shifts

# POPULATION EXPLOSION

# THE WORLD'S POPULATION IS INCREASING AT UNPRECEDENTED RATE

**In the second half of the 20th century, unprecedented rates of population increase were recorded.**

From 1950 to 1999, it grew from 2.5 billion to 6 billion people. Throughout the 20th century, the world's population grew 4 times. Over the same period, consumption of fossil fuels grew 16 times, consumption of water — 9 times, and the total fish production — 35 times. Today, more than 7.7 billion people live on Earth which is 7% of the global population over the entire history of humankind.

By 2025, global population will have grown by 2 billion people compared to the year 1999. The first half of the century will be the period of the largest increase of global population.

**This way, by the end of the century, the world's population may reach 11 billion people.**

1950 – 1999

**X16**

fossil fuels

**X9**

water  
consumption

**X35**

fish production

**X4**

population growth

**Global population increase over the last 12,000 years and forecast up to 2100, bn people**

Sources: [oecd.org](http://oecd.org); [esa.un.org](http://esa.un.org)

7,7

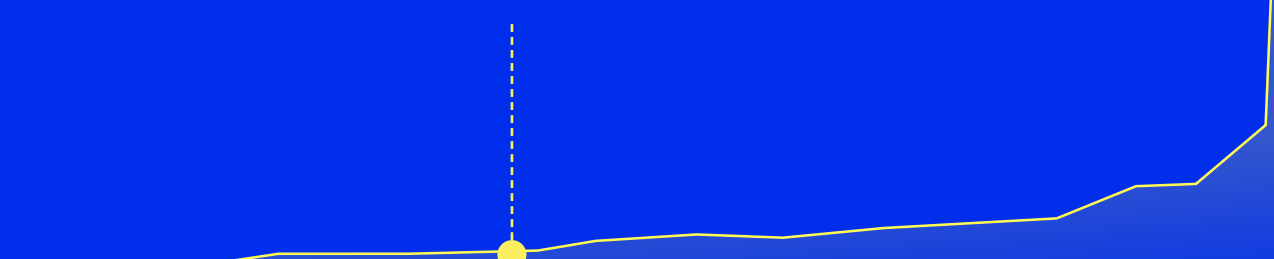
**bn people**

people live on planet Earth today (about 7% of the global population over the entire history of humankind)

2,5

**BN PEOPLE**

1950



# AGRICULTURAL AND CHEMICAL SECTORS ALREADY ADDRESS THE CHALLENGES OF OVERPOPULATION

Companies doing business in farming and chemical industry are the leaders in addressing the challenges of overpopulation. These sectors bear responsibility for finding sustainable ways to give food and cloths, and to ensure decent living standards for billions of new inhabitants of planet Earth.

**Agricultural companies, manufacturers of agricultural chemicals and fertilizers come at the forefront of the global economy.**

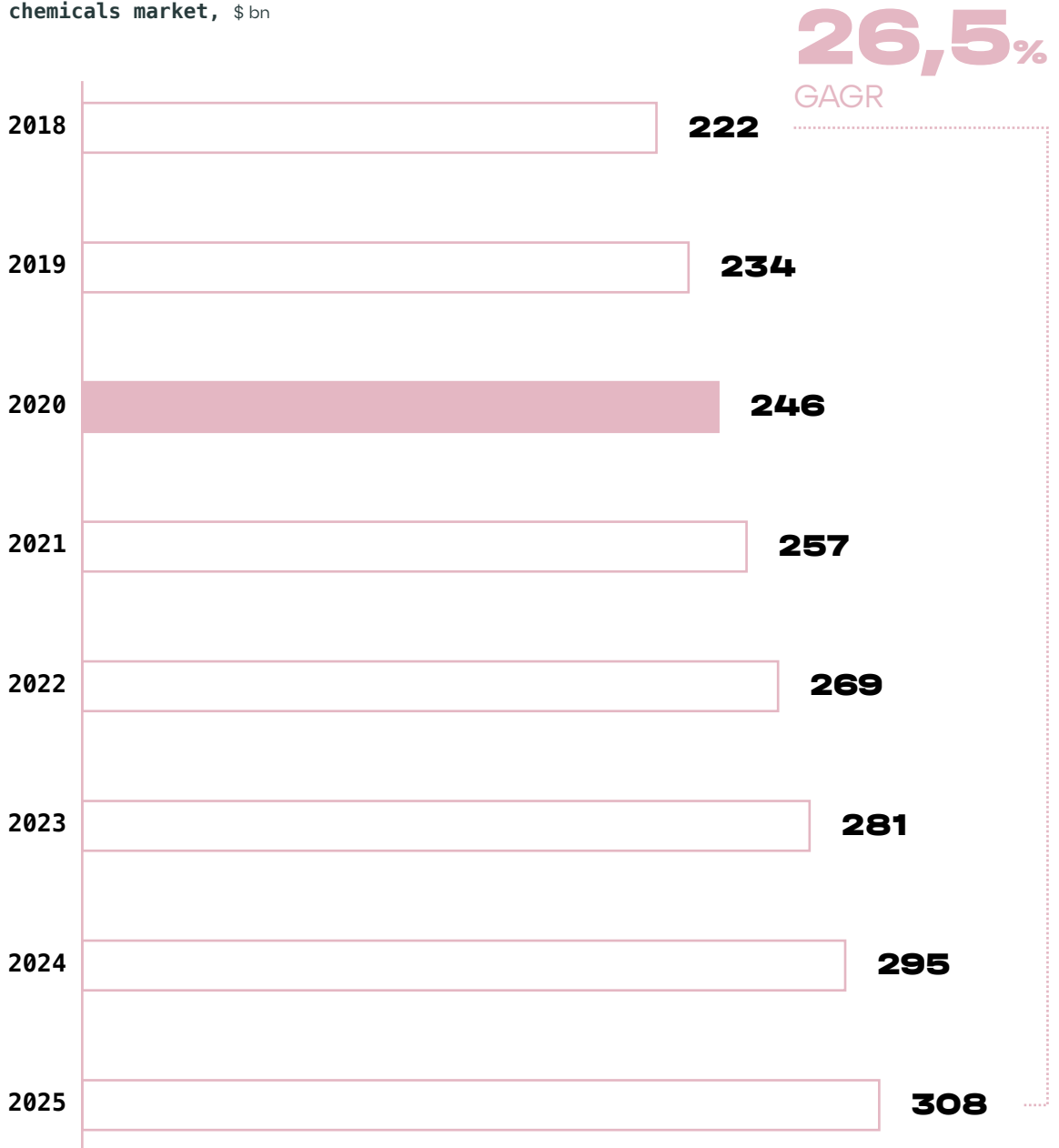
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**There'll be nearly 10 billion people on the planet by 2050. Feeding everyone will require radical innovation in agriculture — while also reducing the impact on the planet. We know this is achievable, thanks to the essential role that phosphorous plays in nourishing soil and supporting plant growth.**

Brand vision of the OCP Group, one of the leading manufacturers of mineral fertilizers

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Scope of the global agricultural chemicals market, \$ bn



While the market for sustainable technologies is projected to grow at an average annual rate of 26.5% from 2019 to 2025, companies involved in development of these technologies, such as BASF, DuPont and Sabic, have put the challenges of overpopulation in the focus of their vision, and made the search for sustainable solutions for global well being an integral part of their mission.

Sources: marketresearchreports.com; alliedmarketresearch.com

# BIRTH RATE GOES DOWN WHILE LIFE EXPECTANCY IS INCREASING

The world's population grows not so much due to birth rate increase as due to life expectancy increase. While in 1950, the average age globally was 24 years, today it reached 31.

The principal cause of life expectancy increase is better access to health care, in emergent economies, too; it resulted in a sharp decrease in deaths from viral infections and in infant mortality.

From 2012 to 2015, the share of population over 65 increased from 8% to 8.5% In 2017, in the European Union, the 65+ age group accounted for 20% of population, while in Russia — for 19%.

## AVERAGE AGE GLOBALLY,

years

24

1990

42

2070

## FERTILITY

average number of children per one woman

3

1990

2

2070

Sources: esa.un.org



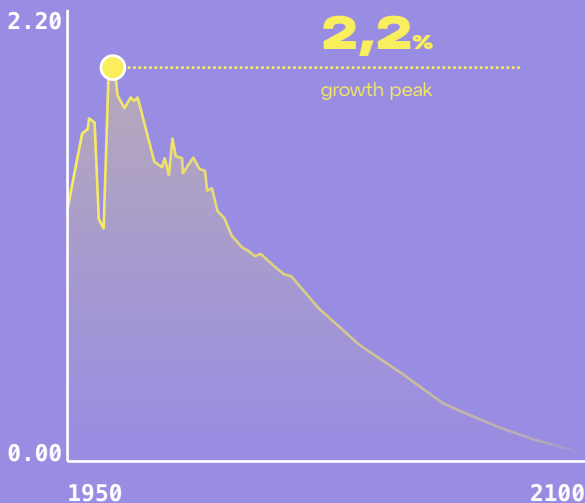
Another cause of population ageing is the decline in birth rate. While in 1992 three children per woman were born globally, in 2017 the number went down to 2.4. By 2070 this number is expected to drop below the reproduction rate (2.1 children per a woman).

**According to forecasts, in 2020 there will be more people over 65 than children under five. By 2050, this age group will account for 16% of global population which will be twice as many as children under five.**

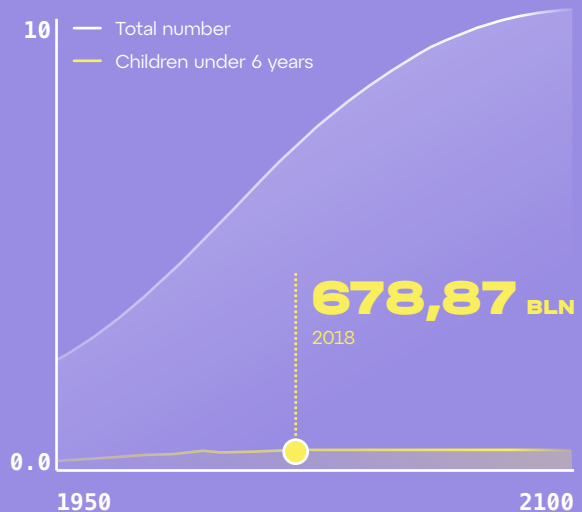
## WHY DOES IT MATTER:

Population ageing may become one of the factors for growing social tension: even if retirement age would be increased, governments will find it difficult to support the needs of ageing population. It will call for substantial restructuring of many sectors that would have to take into account the needs and capabilities of older population, to make more active efforts to involve it in employment and consumption.

Population growth rate per year, 1950–2100, %



World population growth to 2100 (total population and children under 5 years of age), billion people



# OLDER CONSUMERS ARE ALREADY SHAPING UP A NEW MARKET OF THE "SILVER ECONOMY"

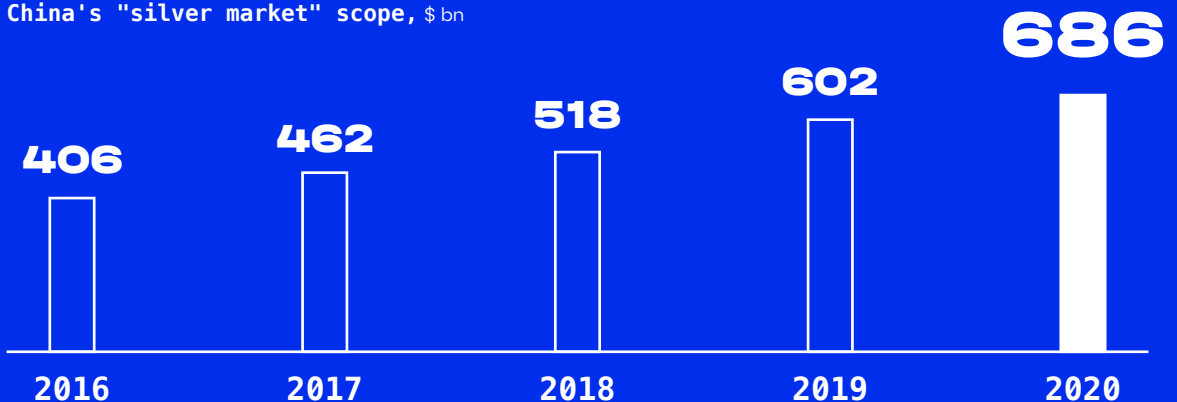
**Far from all older people belong to the economically active population.**

**A new phenomenon — the «silver economy» — is various markets for products and services for people over 60.**

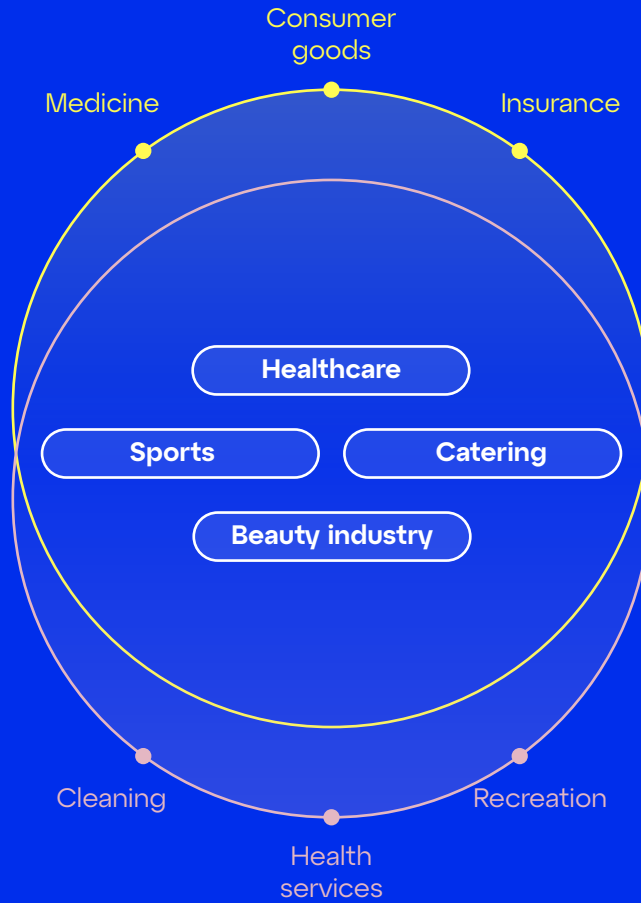
Even today in the US, baby boomers consume 49% of consumer goods and control over 70% of the total disposable income. By 2032, the US silver economy will take over half of the entire national economy.

In China, the silver economy is growing even faster. This year, it is projected to grow up to \$686 bn.

China's "silver market" scope, \$ bn



## Silver economy's products



## Silver economy services

**Key features of the silver economy are the growing wealth of people over 60 and diversification of their consumption pattern: tourism, beauty industry, fashion and healthy lifestyle are gaining more focus.**

Pharmaceutical industry was one of the first to pick up on the silver economy growth. In the dietary supplement market (\$123 bn in 2019) such manufacturers as Douglas Labs (owned by Nestle) started not only to offer new products for active ageing but also modified their communication approach appealing to older people's new role models and needs.

# AFRICA IS BECOMING A NEW SOURCE OF GLOBAL POPULATION GROWTH

**Not only mature economies but also the emerging ones face population ageing: by 2050, 20% of India's population and 31% of China's population will be 65 years or older.**

The only "ever young" region in the world is Africa. Today, in most African countries, the 65+ population fraction is smaller than 5%, while in 21 countries it is below 3%. High birth rate will ensure prevalence of young population in the African continent for the decades to come.

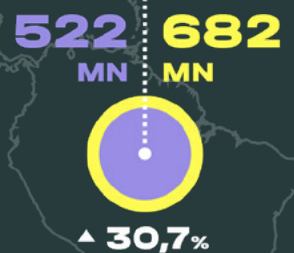
## GLOBAL POPULATION SIZE



### North America



### Latin and the Caribbean Africa

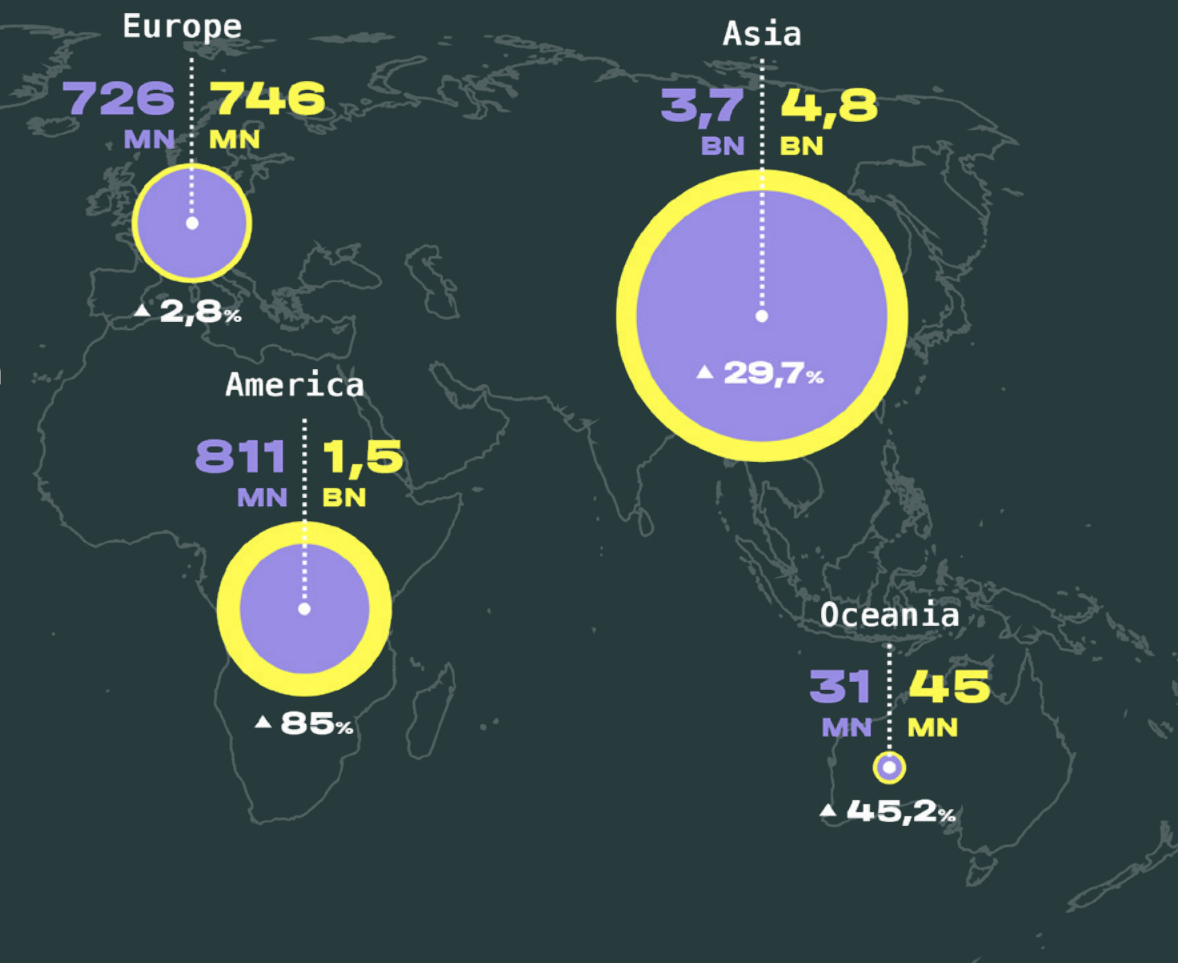


Africa will remain the only region with a significant population growth up to the end of the century, due to sub Saharan countries in particular. The continent's population is expected to increase from 1.3 billion to 4.3 billion between 2020 and 2100.

**According to forecasts, by the end of the century, India will be the most populous country with a population of about 1.5 billion people, while Russia will be near the 20th position with 127 million (today it is at the 9th position). Germany's population will go down from 82.5 to 71 million.**

## WHY DOES IT MATTER:

Global demographic shift will cause an imminent conflict between regional leaders and those countries where growing population will demand more resources and influence on the global agenda. This process may result in a shift in centers of power, realignment of logistic chains, escalation of migration processes, and shifts in the global popular culture.



# MOST PEOPLE AROUND THE WORLD WILL BE LIVING IN THE CITIES

**Today, over a half of global population lives in the cities, and ever more people — in densely populated megacities.**

While in 1950, about 2/3 of people lived in rural areas, by 2050 the distribution will be in reverse: some 68% of the global population will be living in dynamic and rapidly developing cities which is by 12 p.p. more than in 2015 and by 19 p.p. more than in 2005.

The number of megacities in the world has doubled since 1990. The largest share of residents in the cities with a million plus population is in North and South America and Australia. By 2030, 41 metropolitan areas will have 10 million plus population.

## X3

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number of megacities  
since 1990

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Today, the fastest growing metropolitan areas emerge around medium sized cities with population under one million, in Asia and Africa.

By 2050, 90% of urban population growth will happen in Africa and Asia. Africa's urbanization will surge dramatically, and by the middle of the century, the urban population will triple to 61%.

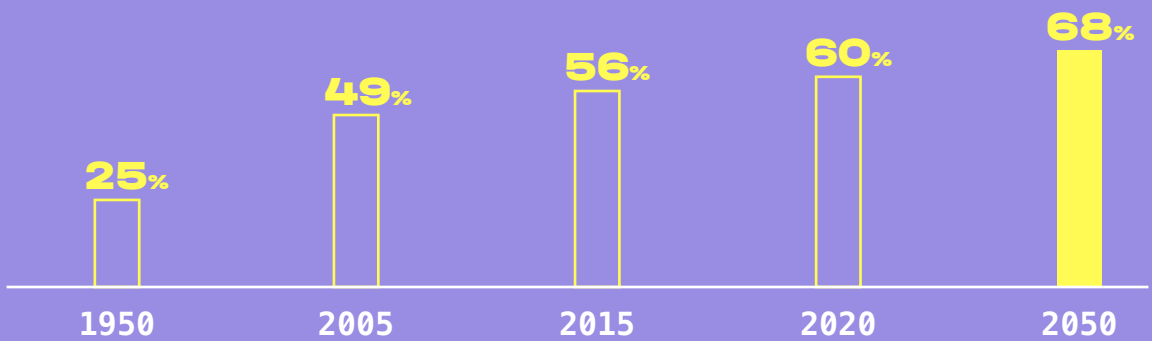
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## WHY DOES IT MATTER:

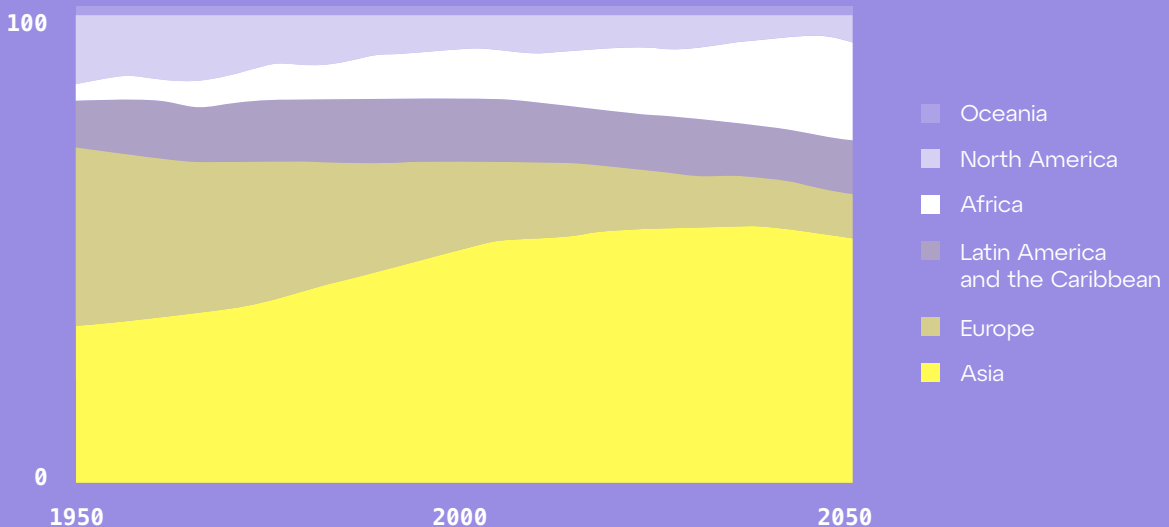
Modern time urbanization is particular in that it occurs not in the most developed countries and not always leads to growth of people's prosperity. The emergence of one million plus cities with lower development levels may aggravate inequality and deteriorate environmental situation.

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Share of urban population, globally



Distribution of urban population, %



**Afrofuturism is an ideology that emerged in response to the fact that the vision of future in science fiction for a long time was based on Western countries' experience: there was no place for Africa, its history and culture in it.**

**The term «Afrofuturism» emerged in 1993; however, the phenomenon was reflected neither in philosophy nor art until the second decade of the 21st century. Its vivid manifestation was the Black Panther movie that gave Africans and people of African origin an image of the continent's future with no technological and economic lagging.**

# THE TOP 10 LARGEST CITIES WILL BE SIGNIFICANTLY DIFFERENT BY 2100

mln people

## 2025

Tokyo, Japan



Mumbai, India



Delhi, India



Dhaka, Bangladesh



Sao Paulo, Brazil



Mexico City, Mexico



New York, USA



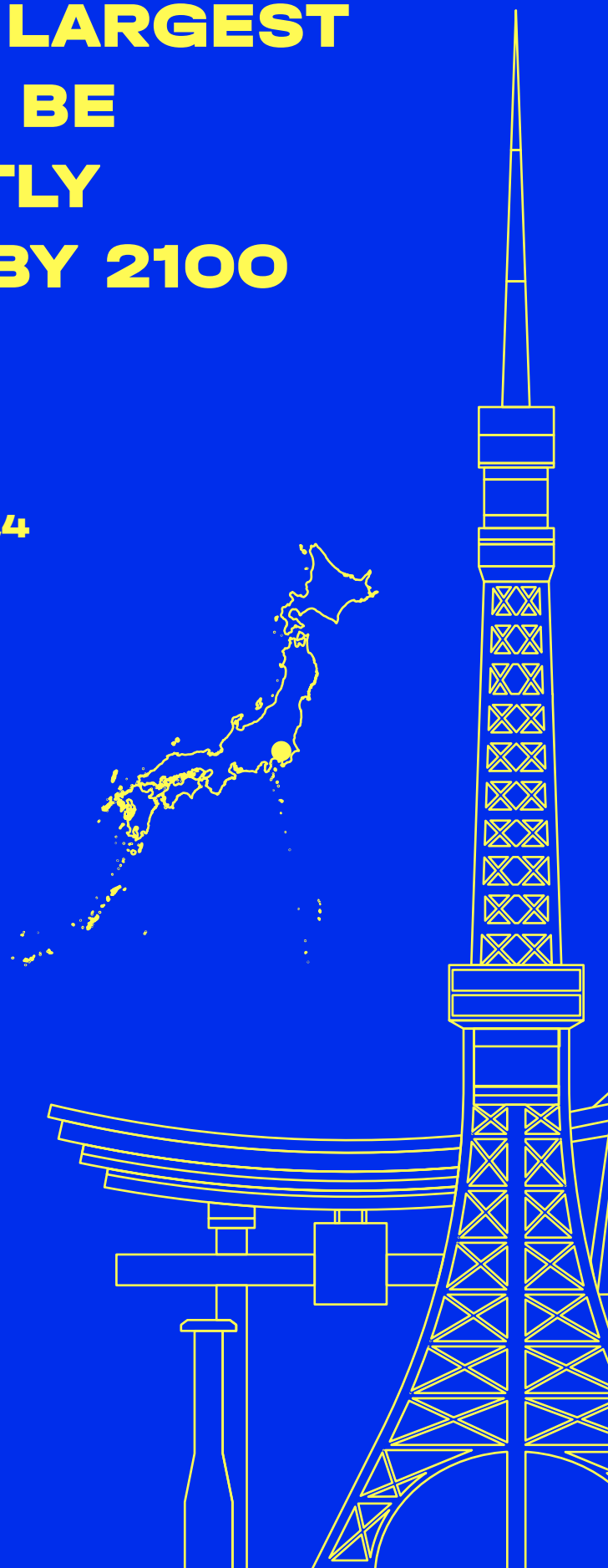
Calcutta, India



Shanghai, China

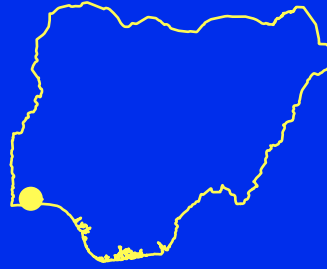


Karachi, Pakistan



Sources: [sites.ontariotechu.ca](https://sites.ontariotechu.ca)





**2100**

Lagos, Nigeria



Kinshasa, Congo



Dar es Salaam, Tanzania



Mumbai, India



Delhi, India



Khartoum, Sudan



Niamey, Niger



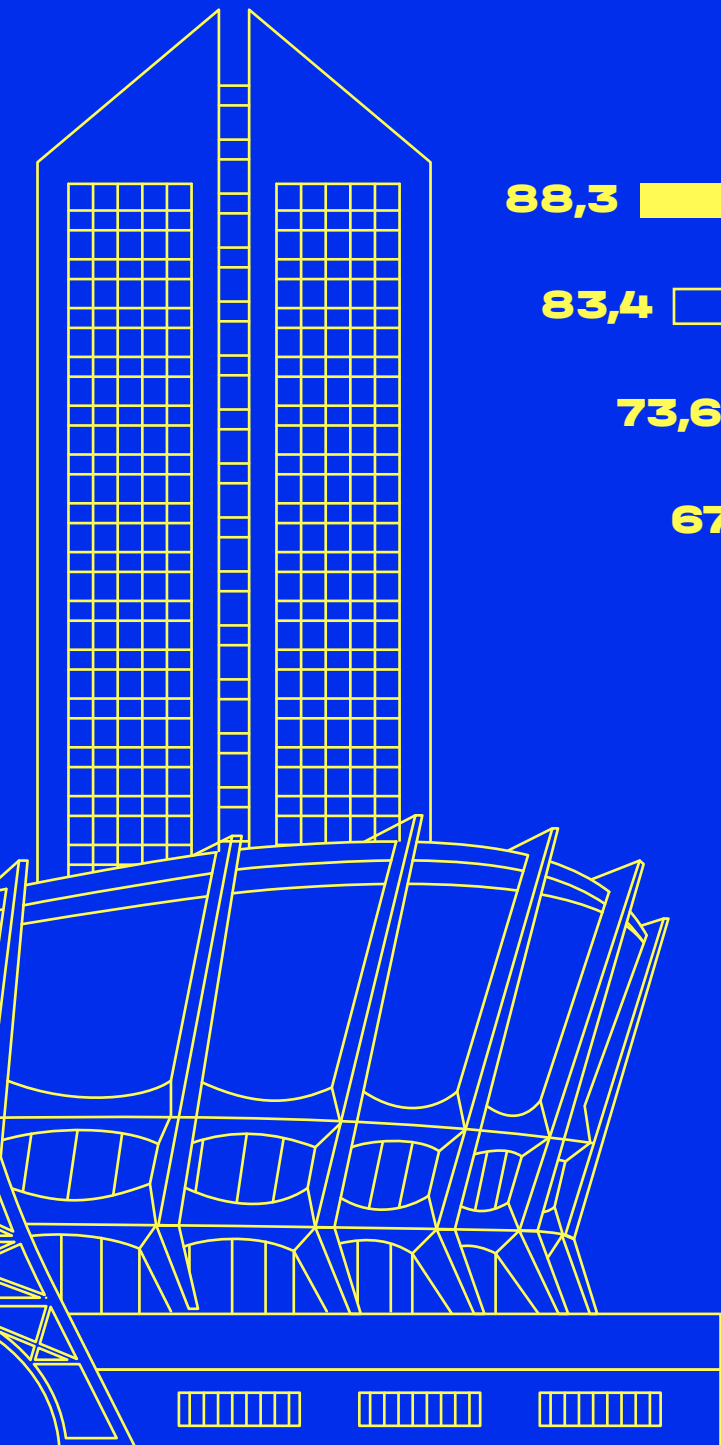
Dhaka, Bangladesh



Kolkata, India



Kabul, Afghanistan



Part 1.1: Socio-demographic shifts

# GROWING MIGRATION

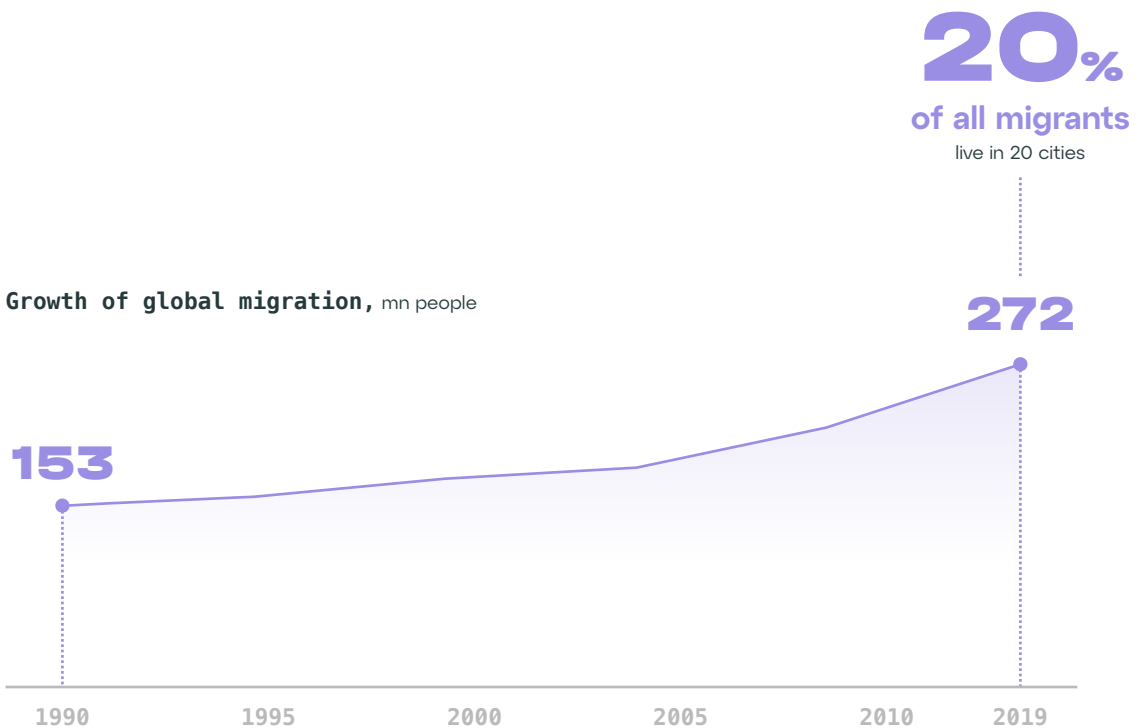
# MIGRATION GROWTH RATES ARE HIGHER THAN POPULATION INCREASE RATES

The number of international migrants grew from 153 mln people in 1990 to 272 mln people in 2019. Global migration growth rates are higher than the world’s population increase rates which resulted in their share in the total population growing from 2.9% in 1990 to 3.5% in 2019.

In 2019, half of all migrants were living in 10 countries, and one in five migrants was living in one of just 20 cities.

**In many countries’ demographic landscape, migration figures have a large replacement effect on their declining population.**

Among immigrants coming to OECD countries, 79% are of active working age while the share of the native population aged 15–64 is 63%.

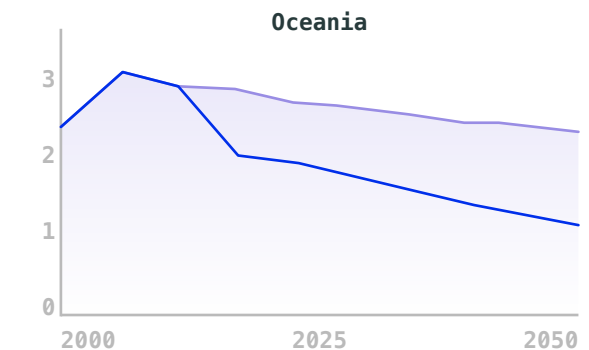
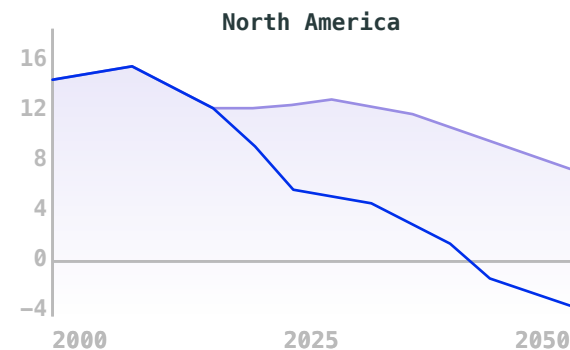
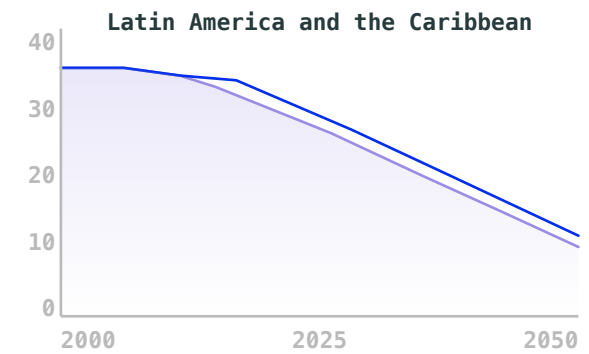
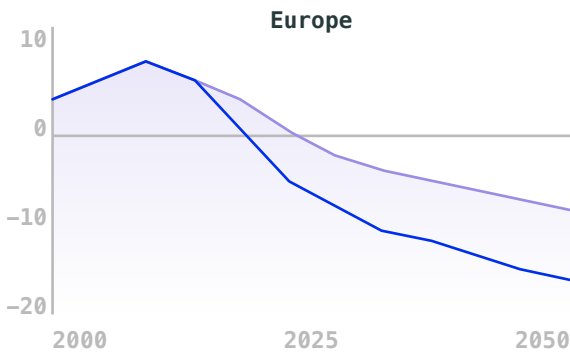
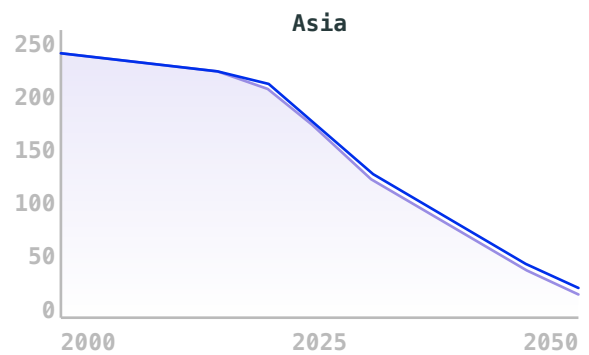
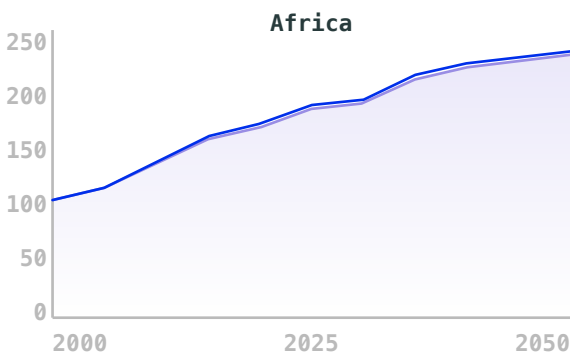


Sources: un.org; migrationdataportal.org; un.org; un.org

# COMPARISON OF POPULATION DYNAMICS SCENARIOS

2000 — 2050, depending on migration level, mn people

- Baseline scenario in which the net migration level of recent years is maintained
- "Zero" scenario in which the number of immigrants is equal to the number of emigrants throughout the entire period from 2015 to 2020



Sources: un.org; migrationdataportal.org; un.org; un.org

# THE ISSUE OF MIGRATION IS BECOMING A SUBSTANTIAL PART OF SOCIAL RESPONSIBILITY

While right wing populist political movements around the world turned their anger against liberal migration policy and illegal immigrants in their countries, transnational corporations stand up for open borders in order to maintain relationships with consumers and authorities in their countries of presence, as well as among numerous diasporas.

**When Donald Trump won the US presidential election, American corporations were quick to shrug off his isolationist rhetoric in order to defend their brands from damage. Since then, migrants support became one of the main topics of their communications.**

With Donald Trump's having adopted the decree prohibiting immigration from seven predominantly Muslim countries, the Lyft taxi aggregator donated one million dollars to the American Civil Liberties Union, Starbucks promised to hire 10,000 refugees, and Budweiser released

a commercial for the final of the National Football League celebrating its immigrant origin.

Airbnb, a vacation rental online marketplace, offered help to refugees as a part of its #WeAccept campaign. The company that earlier was criticized for property owners' xenophobia, received 85% positive feedback in social media where its campaign collected 87 mln impressions.

**Airbnb revisited the issue in 2019 when the company entered a partnership with a number of Brazilian NGOs in order to engage local immigrants in promotion of the Impressions service where anyone can sell their city tours.**

# MIGRATIONS IS BECOMING A GAMECHANGER FOR ECONOMIES

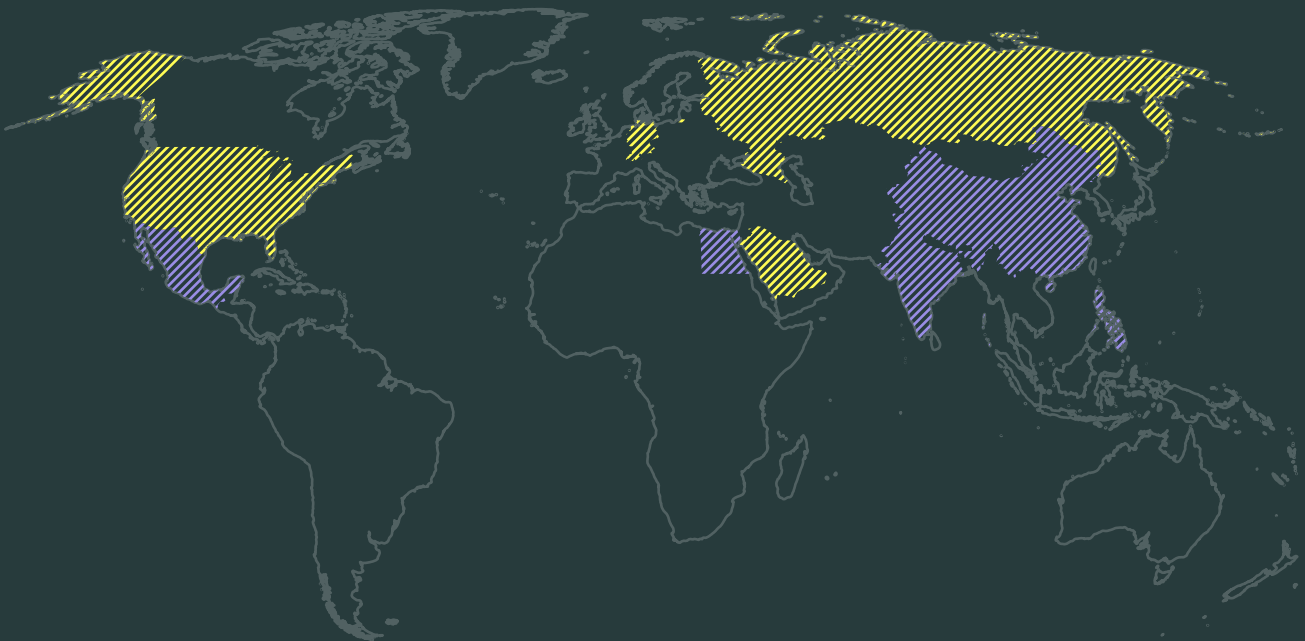
Despite the fact that in 2015, the share of migrants in the global population was a mere 3.4%, their contribution to the global economy amounted to almost \$7 trillion, or about 9.4% of the global product.

In some countries, emigrants' money transfers to their families account for a significant part of national GDP. In particular, 34% of Haiti's GDP is comprised of such money transfers.

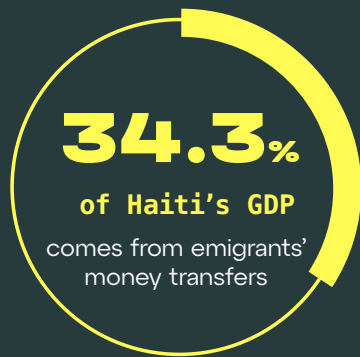
In 2016, immigrants from emerging countries transferred some \$413 bln

to their home countries. In 2019, the amount of immigrants' transfers grew by 30% up to \$554 bln. This is more than the total amount of all foreign direct investments.

**At the same time, five largest money sending countries account for \$176 bln while five largest recipient countries received \$263 bln.**



Sources: knomad.org



### WHY DOES IT MATTER:

Migrants' home countries become ever more dependent on their money transfers. It results in their key economic strategy being exporting employable human resources which makes these economies even more dependent on migrant receiving countries. The latter in their turn, face cash outflow from their economies and may avail themselves of the situation to try and put pressure on migrants' home countries.

Countries with the largest outgoing money transfers, \$ bln

<b>68,5</b>	<b>33,6</b>	<b>26,7</b>	<b>25,4</b>	<b>21,8</b>
USA	Saudi Arabia	Switzerland	Germany	Russia

Countries with the largest incoming money transfers, \$ bln

<b>82,2</b>	<b>70,3</b>	<b>38,7</b>	<b>35,0</b>	<b>26,4</b>
China	India	Mexico	Philippines	Egypt

**“Bamboo Network” is a term defining business ties between people of Chinese origin in Southeast Asia.**

**Chinese diaspora is considered the most numerous and influential in the world. It has some 50 mln people throughout the world and their total wealth is estimated at \$2 trillion.**

70% of the Chinese diaspora live in Southeast Asia where these people are members of an informal community known as Bamboo Network.

Bamboo Network members have a total wealth of 3.5 bln and stakes in the capital worth over \$700 bln.

**They are responsible for some 80% of foreign direct investments and projects in Mainland China.**

**\$3,5 BLN**

is the total wealth of the Bamboo Network members

**\$700 BLN**

worth is the capital in which they have stakes



# QUALIFIED SPECIALISTS TEND TO MIGRATE TO THE MOST WELL OFF COUNTRIES

Another trend is the migration of the most educated people from emerging economies to highly developed countries. In particular, emerging economies suffer from outflow of medical workers as well as IT specialists.

**In 2015-2016, some 30% of immigrants in the G20 countries had university degree. One in five immigrants with university degree came there from India, China, or Philippines.**

In some Central American, Caribbean, and African countries, the share of emigrants with university degree is over 40%; in almost 30 countries their share is over 20%.

A large share of immigrants with university degree also comes from India (51%), China (48%), and Russia (43%).

In the G20 countries some 35% employed immigrants with university

degree are overqualified for jobs they have. Immigrants, especially those who got their degrees in their home countries, often occupy positions that do not require high qualification and are engaged in non standard employment formats.

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## WHY DOES IT MATTER:

While immigrants' home countries often lose valuable specialists that are essential for these economies' prosperity, recipient countries not always are able to make sure that the jobs migrants get are worth them. As a result, the less wealthy countries' development gap is getting ever wider while the global labor market is short of specialists essential for the growth of the global product.

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# HALF OF THE LARGEST US COMPANIES WERE FOUNDED BY IMMIGRANTS

Researchers found that immigrants are more likely to launch their own business: this step is most often taken by people with a higher risk tolerance, while challenges in a new country only make them stronger.

This explains the fact that 20% of the companies on the Fortune 500 list were founded by people born outside the US. Among them are Sergey Brin (Google), Eduardo Saverin (Facebook), and Elon Musk (Tesla). In 1990–2019, some 25% of American startups were founded by immigrants.

**Today, 55% of the startups with capitalization over \$1 billion have at least one immigrant founder.**

As of 2018, of the 25 US public IT companies with the highest net worth, 14 were founded by first or second generation immigrants like Steve Jobs, son of Abdulfattah Jandali, a Syria native.

Many of the iconic American brands such as Kraft Heinz that came as a result of the merger of two companies founded by German natives, today remind us of the history of American business through their names. They not only celebrate the USA, the country where they were established and achieved success, but also home countries of their founders.

## Migrants' names are an important part of commercial brands' landscape

### «DUPONT»

**ÉLEUTHÈRE  
IRÉNÉE DU PONT**

France

35/500\*

DuPont was one of the first companies to move to the US with a foundation of expertise, high-end equipment and capital earned in France

### KOHL'S

**MAXWELL  
KOHL**

Poland

156/500\*

Maxwell Kohl came to the United States from Poland and worked in factories in the Milwaukee area until 1927 when, at the age of 26, he used his savings to open a small grocery store.

### NORDSTROM

**JOHN W.  
NORDSTROM**

Sweden

196/500\*

Nordstrom came to the US with only five dollars and managed to save up 13 thousands in two years to open his first store



**CHARLES  
PFIZER**

Germany

61/500\*

In 1849, Charles L. Pfizer borrowed US\$2,500 from his father to buy a commercial building in Williamsburg, Brooklyn and then co-founded Chas. Pfizer & Co. Inc. with his cousin, who was also born in Germany

### KraftHeinz

**JAMES L.  
KRAFT**

Canada

115/500\*

James Kraft used his last money to rent a horse with a cart and then founded a business of selling cheese in wholesale to sell it to local stores

\* Fortune 500 2019

Sources: marketingdive.com; forbes.com; kleinerperkins.com

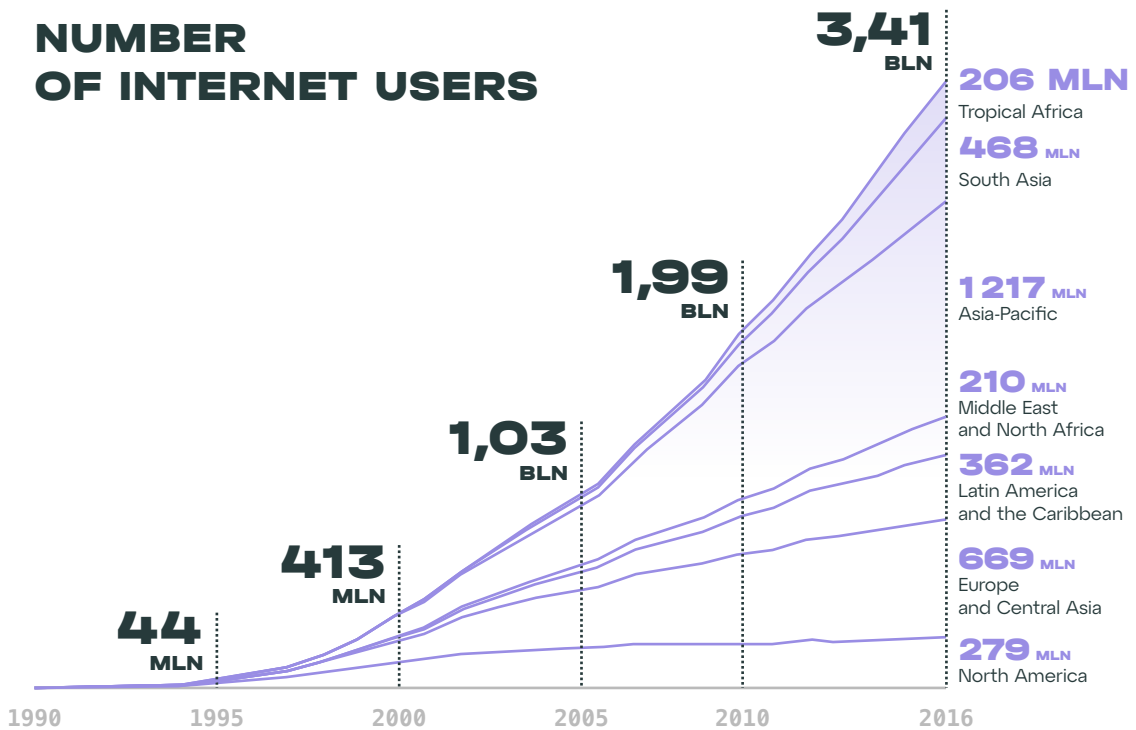
Part 1.2: Technological progress

# UBIQUITOUS INFORMATION

# IN JUST 30 YEARS, THE COMMON DIGITAL SPACE UNITED THE ENTIRE WORLD

A qualitative leap in technology development occurred with the advent of the Internet and, later in 1993, of the Mosaic web browser with graphics interface.

It all paved the way for the explosion of interest to the Internet. In just two years since the Mosaic browser was introduced, the world wide web went international, having worked its way from a little known geeks' development to the essential element of everyday life of the majority of people on planet Earth.

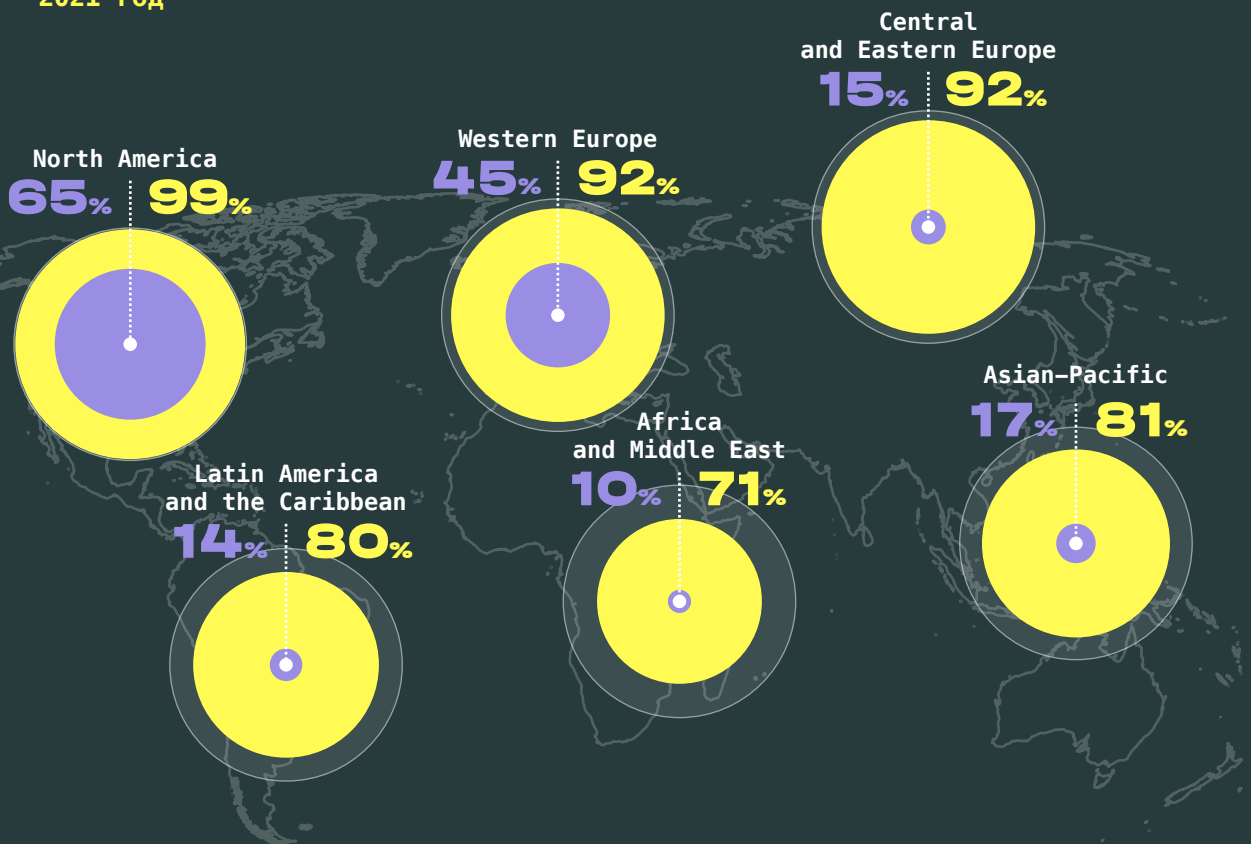


Sources: google.com; rolandberger.com

## SHARE OF CONNECTED SMARTPHONES IN THE OVERALL AMOUNT OF MOBILE DEVICES

2013 год

2021 год



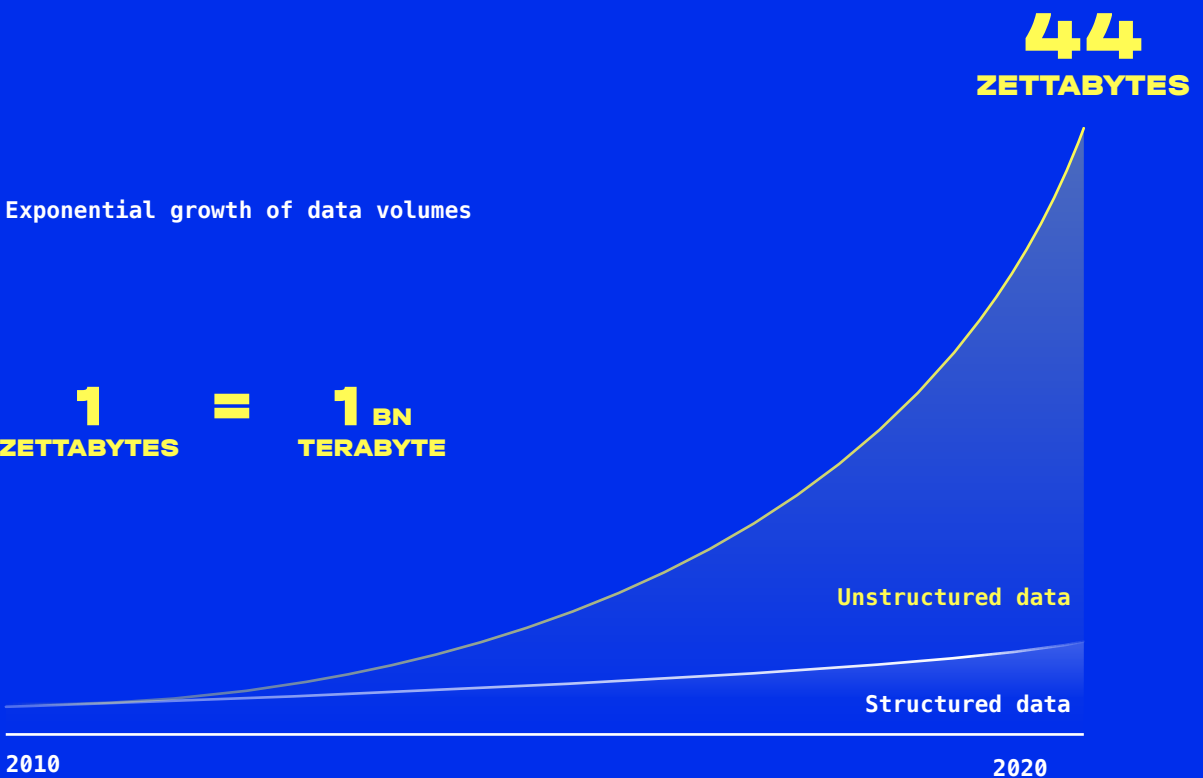
The second leap occurred when consumer electronics with Internet access became affordable. Extensive use of smartphones paved the way for the explosion of interest to the Internet. In just two years since the Mosaic browser was introduced, the world wide web went international, having worked its way from a little known geeks' development to the

essential element of everyday life of the majority of people on planet Earth. The second leap occurred when consumer electronics with Internet access became affordable. As smartphone became a usual thing, millions of people got an opportunity to discover and master new technologies, interact with people throughout the world.

# DIGITAL DATA BEAT ANALOG DATA; HOWEVER, NEW ISSUES AROSE

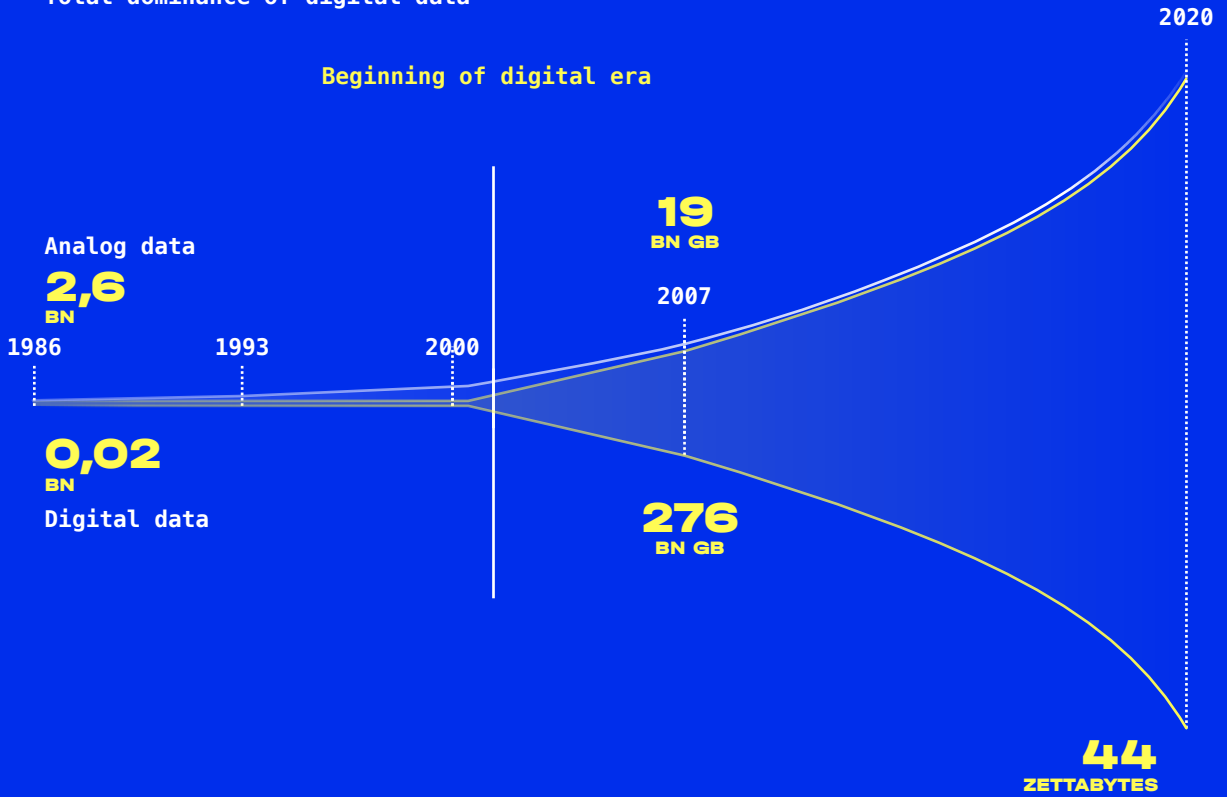
**With the advent of personal computer and the Internet, the volume of generated data began to grow exponentially. In 2007, 93% of all information in the world was in digital format.**

Starting from 1985, the amount of digital data in the world has been increasing tenfold every two years; therefore, by today, the digital data amount should be 44 ZettaBytes or over 5,200 gigabytes per each person on the planet. This number of bytes is 57 times greater than the number of sand grains on all beaches in the world.



Sources: [kk.org](http://kk.org); [blazon.online](http://blazon.online); [seedscientific.com](http://seedscientific.com); [d-russia.ru](http://d-russia.ru); [datamation.com](http://datamation.com)

## Total dominance of digital data



A significant part of all data is dark data, unstructured information which is either impossible or meaningless to use.

This data is comprised of texts, photos, videos, including those from CCTV, as well as an immense amount of information that machines generate while interacting. Costs of storing such data are significantly over \$1 trillion per year.

## WHY DOES IT MATTER:

We live in the world where amounts of information we encounter on a daily basis are growing at the rate that is not defined by our ability to use or process it. As organizations store more and more unnecessary data, we find ourselves in an environment overfull with information, and businesses lose the efficiency that are supposed to increase through digitalization.

# CLOUD STORAGE AND COMPUTING BECAME A HUGE BUSINESS

Growth of data volumes and complexity led to growing maintenance costs and gave rise to the demand for outsourcing of data storage and processing. This is how cloud services emerged.

Soon, new models of subscription services were invented:

**SaaS** — web softwares that do not require installation: Gmail, Google Docs, or MS Office 365;

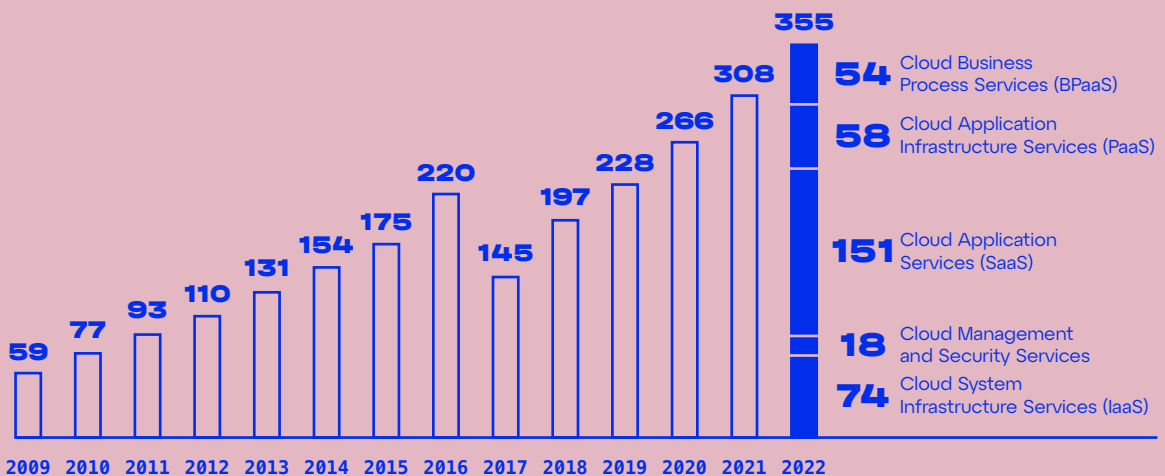
**PaaS** — cloud platforms allowing to deploy and use software;

**IaaS** — digital infrastructure as an extension of a business's own infrastructure.

To date, the global market for cloud services is estimated at \$266 bn, and by 2022 it is expected to grow by another 33%.

**Cloud solutions are most widely used in healthcare, public sector, financial, retail, and manufacturing businesses.**

Forecast of global revenue from open cloud services, \$ bn



Sources: gartner.com; statista.com; tadviser.com; interbrand.com



**Salesforce was a trail-breaker in the cloud revolution; it was among the first to adopt the SaaS model having offered subscription for corporate applications on its website.**

Founded in 1999, the company is now worth some \$180 bn. Today, cloud services are offered by such giants as Amazon Web Service, Microsoft

Azure, and Google Cloud with a total 52% share of the global market.

The growth of data volumes made cloud services universally known within a short period of time: over one billion people use Google Drive, a cloud storage service, while such brands as Sap and Oracle are worth more than Pepsi and Ikea and year after year climb up in the Interbrand's Best Global Brands report.

01  
+9%  
234,2 \$m



02  
+8%  
167,7 \$m



03  
+24%  
125,3 \$m



04  
+17%  
108,8 \$m



05  
-4%  
63,4 \$m



06  
+2%  
61,1 \$m



07  
+5%  
56,2 \$m



08  
+5%  
50,8 \$m



09  
+4%  
45,4 \$m



10  
+11%  
44,3 \$m



11  
+1%  
41,4 \$m



12  
-6%  
40,4 \$m



13  
-7%  
40,2 \$m



14  
-12%  
39,8 \$m



15  
+3%  
35,5 \$m



16  
+7%  
32,8 \$m



17  
+14%  
32,2 \$m



18  
+1%  
26,3 \$m



19  
-22%  
25,6 \$m



20  
+10%  
25,1 \$m



21  
+3%  
24,4 \$m



22  
+11%  
22,1 \$m



23  
+13%  
21,6 \$m



24  
-1%  
20,5 \$m



# LIFE IN SOCIAL MEDIA SPINS OUT OF OUR CONTROL

**To date, over 4.5 billion people use the internet while almost 4 billion use social media.**

Recent research shows that by the middle of this year, more than half of the world's population will be using social media.

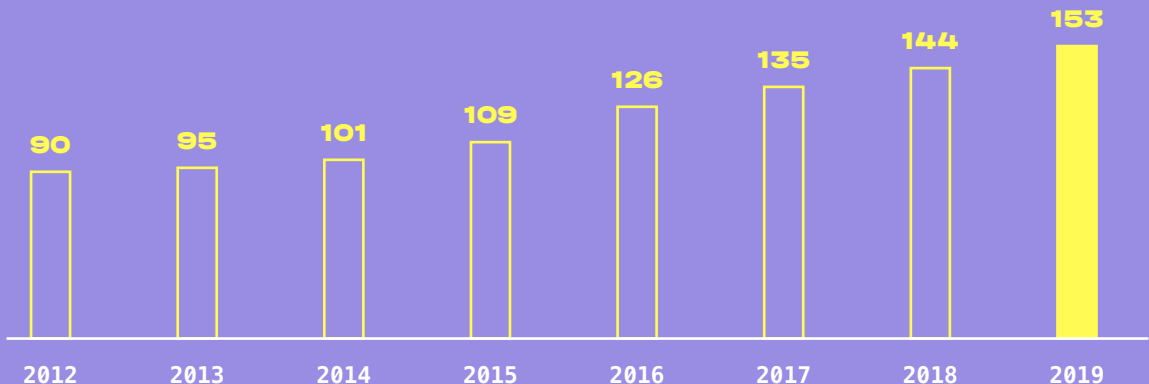
Social media not only gained universal popularity, they also stole our undivided attention. Today, we spend an average of 2.5 hours per day in social media and this number will be only growing.

However, from country to country, the time spent in social media differs.

Residents of emerging economies are most active users of social media with two times more hours spent in average than in mature economies. For example, citizens of Philippines spend an average of four hours a day in social media while citizens of Japan — only 45 minutes.

According to a forecast, those born in the 21st century will spend approximately seven years of their lives in social media. This trend makes us very different from all our predecessors on planet Earth and constitutes most serious challenges to us.

The amount of time spent daily in social media in 2012–2019, minutes



Sources: weforum.org; wearesocial.com; statista.com; mckinsey.com; journals.uchicago.edu; broadbandsearch.net; bls.gov; today.yougov.com

Although thanks to social media people's interaction increased manifold in terms of quality and quantity, the sense of isolation did not go away. On the contrary, it became even more intense as a study by the University of Pennsylvania shows.

**It is millennials, the generation of the «triumphant digitalization», who are more than others (by 11%) aware of this trend.**

**3 500 000**  
**minutes**

spent in social media in a lifetime

## WHY DOES IT MATTER:

Social isolation may cause various cognitive biases in a person. Such people tend to perceive the world more dangerous, expect bad experience from communication with other people, as well as to remember more negative information. All this causes pessimistic approach, panic conditions, stress, low self esteem, cognitive bias and its every effects, makes decisions less efficient, and affects a person's health in general.

### Average time spent throughout life

Household



**1 YEAR AND 8 MONTHS**

Communication



**1 YEAR AND 11 MONTHS**

Shopping



**2 YEARS AND 2 MONTHS**

Meals



**3 YEARS AND 7 MONTHS**

Social media use



**6 YEARS AND 8 MONTHS**

Watching TV



**8 YEARS AND 4 MONTHS**

Sleep



**26 YEARS AND 5 MONTHS**

# IN THE 21ST CENTURY, PERSONAL DATA IS THE NEW OIL

Users of online services directly or indirectly (as a digital footprint) submit a large volume of information of themselves, leaving a digital footprint.

**These data are of enormous value in the digital economy, estimated at \$ 3 trillion.**

The largest IT corporations such as

Google, Facebook, Microsoft, and Amazon already keep at least 1.200 petabyte of user data.

While search engines, social media, and e-commerce platforms accumulate ever more data, most of the companies engaged in conventional business have no other choice but to pay for access to them.

**The changes brought in by digital services are largely related to the user generated content concept. Whereas in the past, mass media had a monopoly on generation and distribution of information, now, blog platforms and social media give this opportunity to anyone, thus revolutionizing public mind.**

**This concept's development determined the landscape of the present day media environment and the ways businesses now market their products.**

The need for services which allow generating own content is confirmed by their use:

**152 MLN**

daily Twitter users post over 500 mln twits

**500 MLN**

people every day visit Instagram to post over 100 mln photos

**500 HOURS**

of videos are uploaded in YouTube every minute

**4 PETABYTE**

of new data is generated daily in Facebook

**The enormous importance of personal data including the political aspect, had an impact on the idea of national sovereignty with information independence as its integral part.**

**The concept of digital sovereignty came as a response to the increasing gap in access to data between those countries where data accumulating and processing centers are located and those that cannot obtain and use data of their citizen.**

Digital independence affects not only international relations but also relations between corporations that increasingly influence politics and even try introducing their one currencies.

GDPR, General Data Protection Regulation is a tool for ensuring this type of independence in the European Union.

The same aim has the Yarovaya legislative package in Russia that along with China seeks to strengthen its independence in this area.

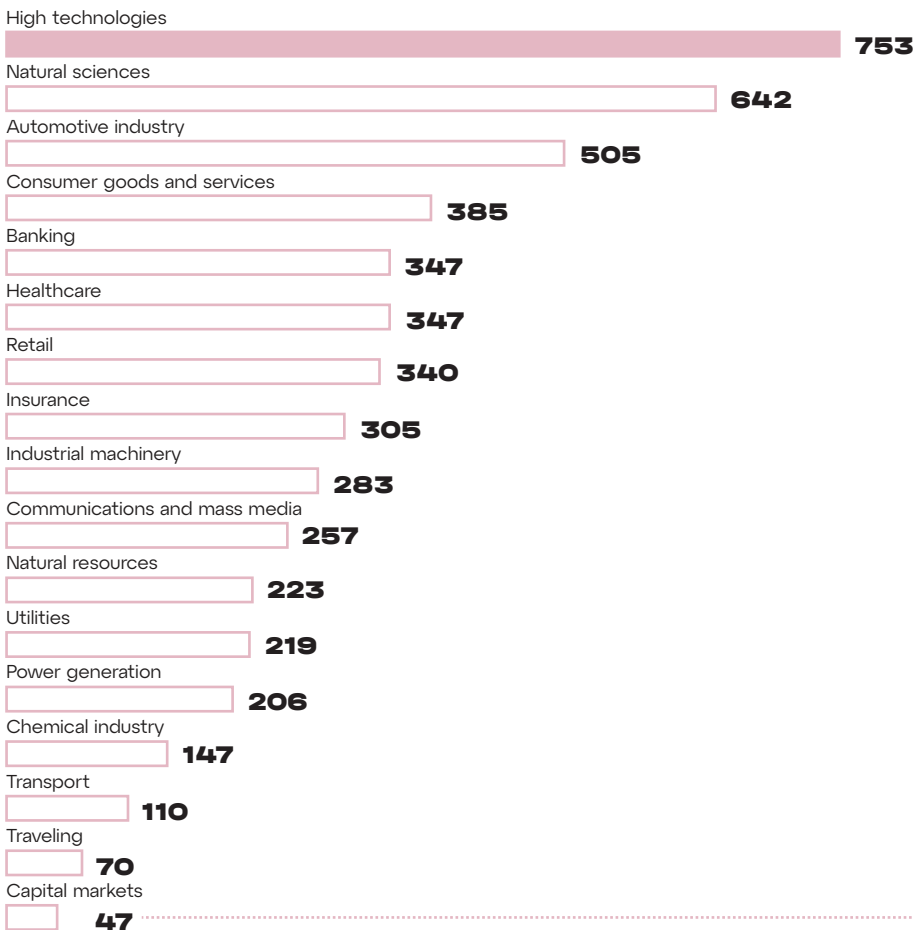
In this context, data leaks and cyber terrorism are becoming ever more substantial threats. In the most serious personal data leak incident that occurred at Yahoo in 2013, personal data of more than three billion people were affected.

According to a forecast, in 2019–2023, losses from global cybercrimes may amount to \$5.2 trillion.

## WHY DOES IT MATTER:

User data of millions of people constitute a key resource of the economy based on digital technologies. This resource's distribution determines the balance of power not only in business but also on the global stage as a whole, while cybercrime becomes a critical factor in the world where data is all important.

### Expected lost revenue within next five years, \$ bln



**\$5,2**  
trillion

Sources: [accenture.com](https://www.accenture.com)

Part 1.2: Technological progress

# DIGITAL REVOLUTION

# ADVANCEMENTS IN TECHNOLOGIES SIGNIFICANTLY ACCELERATED IN THE 21ST CENTURY

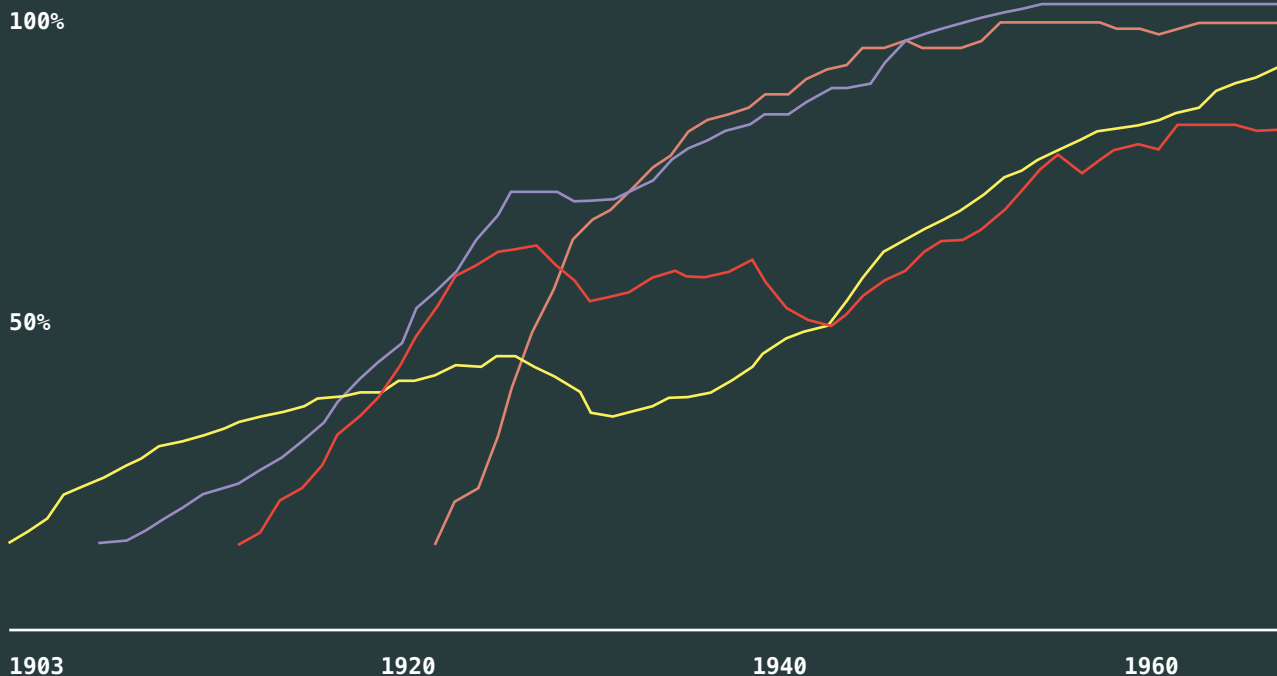
The last two decades were unique in that ever more breakthrough innovations emerged in the market and spread at unprecedented rate.

Never before had people's lives undergone such dramatic changes. Notwithstanding the projected impact of new technologies on global economy, the rate at which they develop and spread goes ahead of policy making and developing sustainable

practices of their implementation.

McKinsey analysts estimated the contribution of key technologies to global product at \$17-40 trillion in 2017-2025. They see the largest potential in the mobile Internet, automation of intellectual labor, and in the Internet of Things.

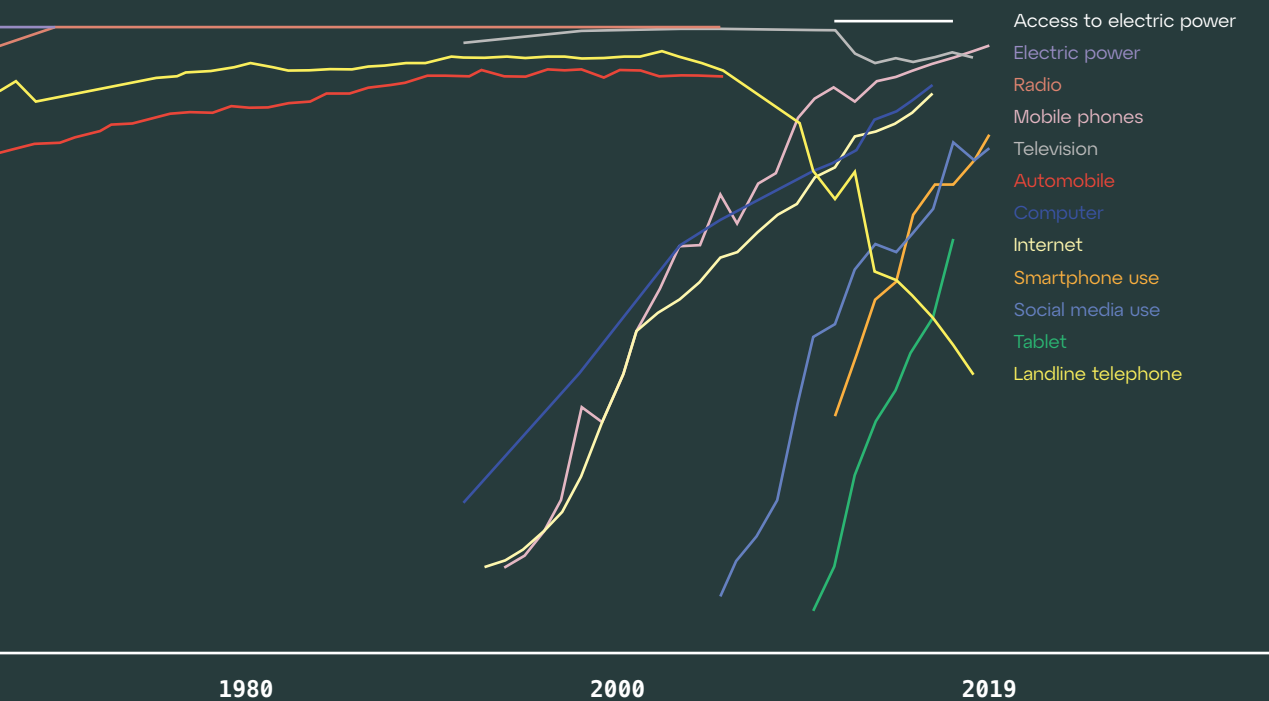
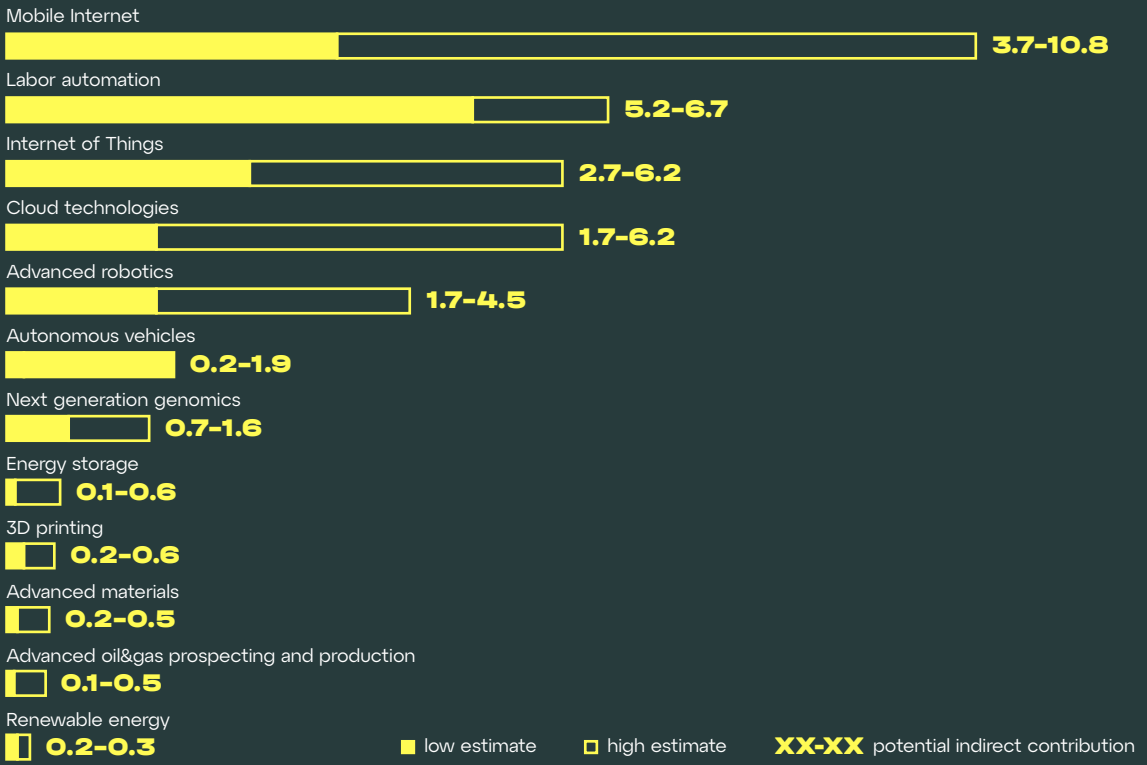
## US households' adoption of new technologies



Sources: ourworldindata.org; rolandberger.com



Economic potential of new technologies to 2025, \$ trillion per annum



# ARTIFICIAL INTELLIGENCE DEVELOPMENT IS A NEW "SPACE RACE"

**The Fourth Industrial Revolution is a concept first introduced by Klaus Schwab, the executive chairman of the World Economic Forum in order to formulate a new phase in the global development determined by total digitalization including that of physical environment and living organisms.**

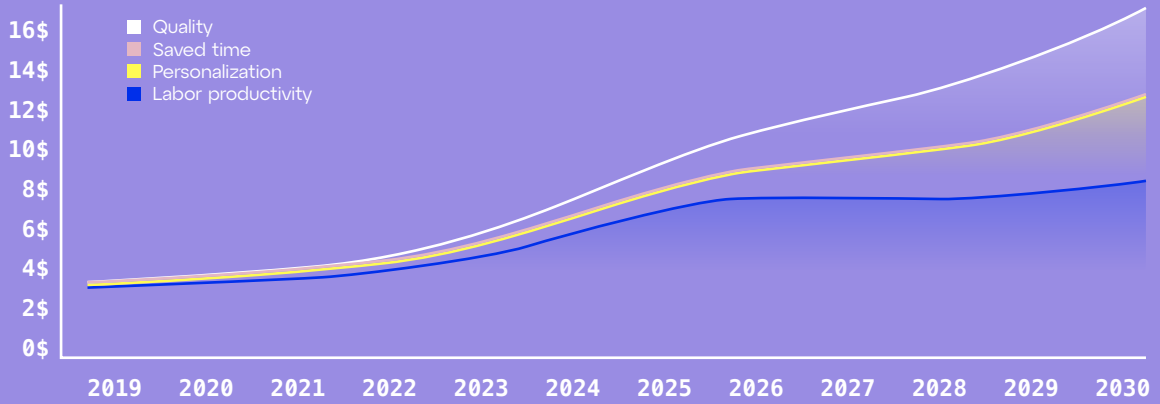
Artificial intelligence is considered the most significant factor of the Fourth Industrial Revolution. Its adoption will be very rapid; by 2030 they will account for some 1.2% of the annual increment of the global product which is more than all previously adopted technologies did.

The need for scientific personnel and significant investments determined uneven distribution of efforts towards AI development. It is illustrated by the geography of AI startups, 40% of which are located in the USA, another 11% in China, and a total of 32% in Europe and Israel (2018).

This revolution is determined by such technologies as artificial intelligence, 5G networks, the Internet of Things, nanotechnologies, 3D printing, robotics, quantum computing, biotechnologies, and autonomous vehicles.

The key feature of this phase, however, is not the technologies per se, but the consistency and speed of their spread which many consider exponential

Projected impact of AI technology for global GDP, US tn



The development of AI is referred to as the new “Space Race” as governments get deeply involved in it. Thus, in 2018, China invested \$7 bln in AI development to 2030, the US — \$2 bln to 2023, and the EU planned to spend \$1.5 bln by 2020.

**WHY DOES IT MATTER:**

Artificial intelligence technologies have a huge potential for the development of humankind; however, even today we can see a new source of global instability in them. Instead of cooperating for the common good, major powers and governments alliances get involved in the race where powerful corporations willing to determine the world’s future are equally engaged.

Venture capital investments, \$ billion



# ARTIFICIAL INTELLIGENCE

In everyday language, the term “artificial intelligence” implies the technologies that enable machines perform mental tasks instead of humans. At the same time, within the area, several specific concepts emerged:

---

## APPLIED AI

Systems aimed at solving issues in particular areas

---

## UNIVERSAL AI

Hypothetically existing systems that are close to humans in their ability to solve a wide range of tasks of various complexity

---

## SUPER AI

It exists mainly in the imagination of science fiction writers. An AI with self awareness, the emergence of which will mean the end of human history.

---

Applied AI solutions have been present in our lives for many years, but significant progress in this area became possible in the 2010s with the discovery of deep learning methods that expanded artificial intelligence systems’ ability for automatic learning.

While the prospects of AI and its impact on the future of humankind are subjects of philosophers’ disputes, the new phenomenon of “augmented workforce” implies interaction of human and artificial intelligence in order to solve job tasks.

# ROBOTIZATION OF PRODUCTION MAY LEAD TO GLOBAL UNEMPLOYEMENT

Labor automation is the prime sphere of artificial intelligence application. A McKinsey study found that of the 749 billion hours worked worldwide in 2015, 278 billion (or 64%) could be automated. By 2030, it might displace

the efforts of up to 400 mln people. First of all, it will affect hospitality and catering sectors, as well as manufacturing sector that is already shifting towards the Industry 4.0 model.

## Potential for automation, %

Home and food



Production



Transportation and warehousing



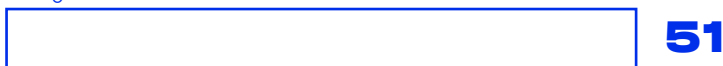
Farming



Retail



Mining



Labor automation is also associated with robotics development. So far, its benefits have been reaped only in mature post industrial economies with high labor costs.

In other countries, robotization is still cramped by its high cost compared to human labor, but with the advent of more affordable automation solutions, millions of jobs may be displaced. For example, in Vietnam, 86% of all jobs in textile industry may be affected.

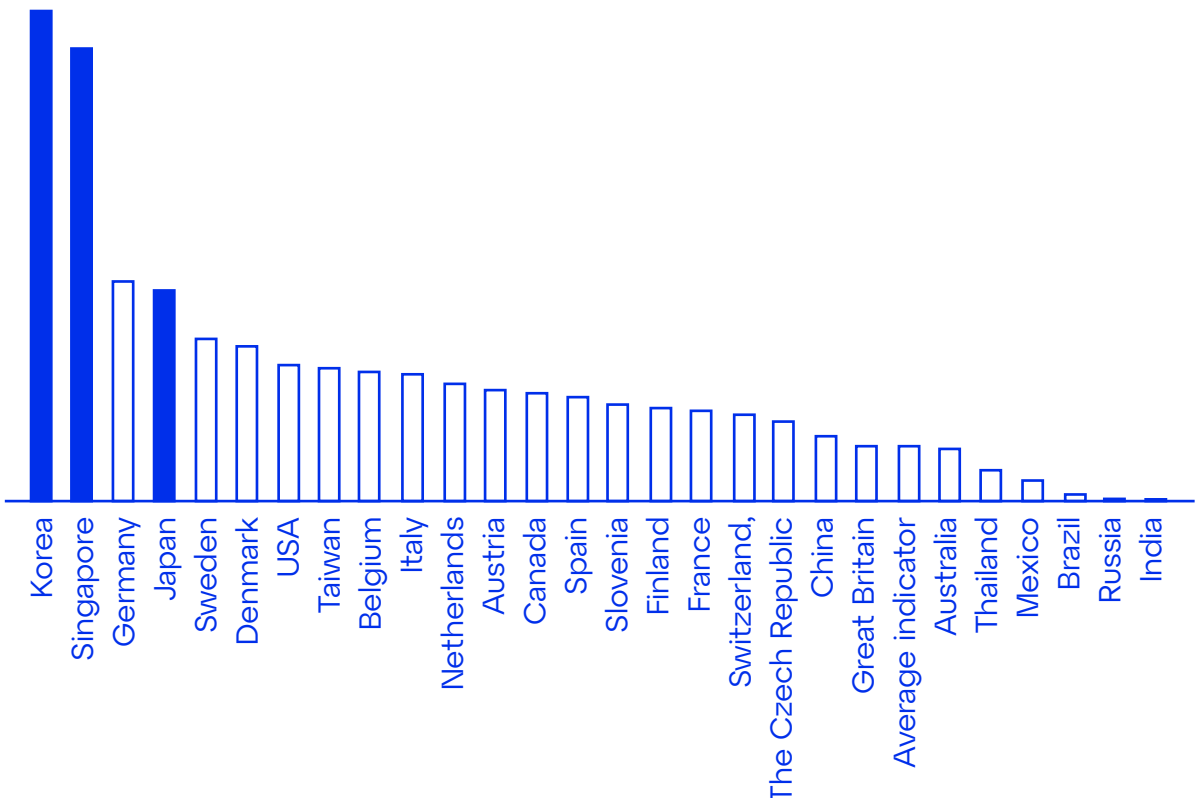
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## WHY DOES IT MATTER:

While robotization is an obvious boon for post industrial economies where displaced workforce can find occupation in other sectors, in emerging economies, dozens of millions of jobs occupied by the most vulnerable workforce for which it will be difficult to find a better occupation, may be in danger. These people will have to either shift to grey economy sectors or leave their countries to work for residents of more prosperous countries.

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Number of robots per 10 000 workers, 2017



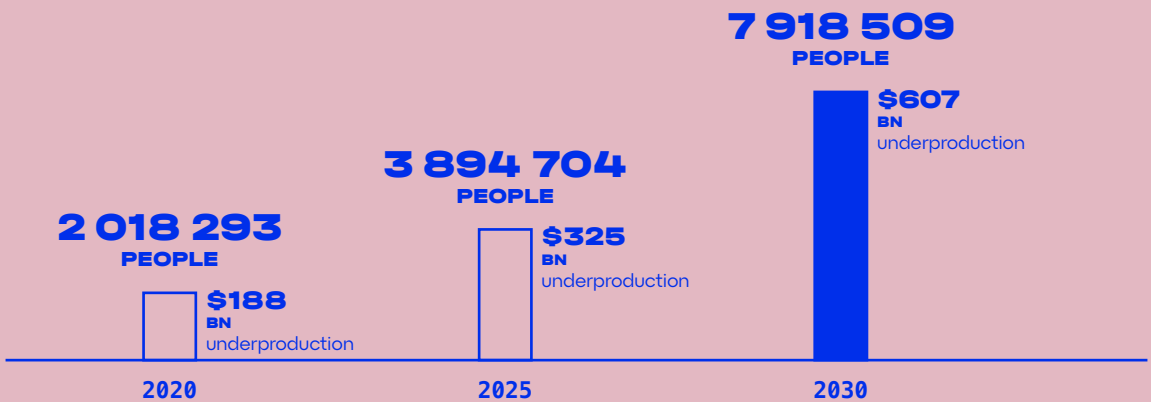
Sources: mckinsey.com; mckinsey.com; ifr.org

# MANUFACTURING COMPANIES BECOME IT COMPANIES

Digital transformation proved to be a significant challenge for manufacturing companies. The need to modify approaches to production processes, marketing, and sales revealed a lack of respective competences and spurred global competition in talent scouting. Recruiting engineers, marketing experts, and managers possessing change management skills and ability to work in cross functional teams, in order to replace the old time workforce became a critical factor of success.

**Manufacturing companies had to make tremendous efforts to change their brands and corporate culture in order to align with the new realities, needs of specialists and consumers.**

Manpower shortage in industries and respective underproduction



Famous became the case of positioning change of the industrial giant General Electric that in 2008 began the process of digital transformation. In the conditions of intense competition for workforce against technological startups, GE launched the What's the Matter With Owen campaign telling a story of an IT specialists applying for a job with GE. The campaign resulted in 8 fold rise of job application number.

Sources: kornferry.com; stantonchase.com; contently.com

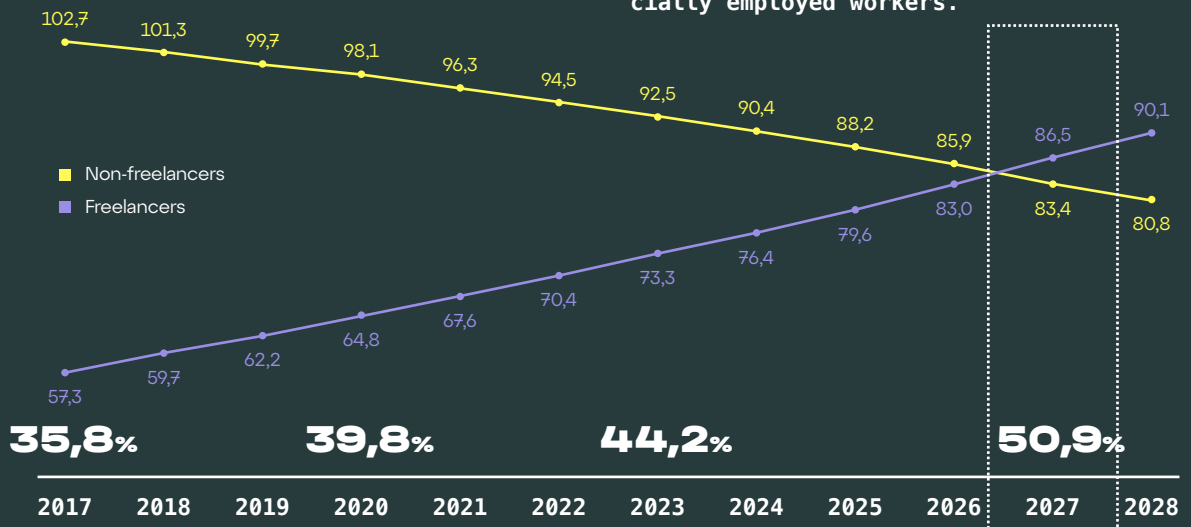
# DIGITALIZATION GIVES RISE TO A NEW GLOBAL WORKING CLASS

Digitalization has given impetus to the development of decentralized economic models, such as collective consumption, peer to peer services, and crowd funding, giving rise to the economy of platforms and ecosystems.

In the labor sphere, it is reflected in the growing demand for flexible forms of work such as freelance or crowd-sourcing that are part of the gig economy. Today, this concept also includes taxi services and platforms for searching freelancer for any technical/home or business services.

**Researchers of Harvard and Princeton found that in the US, from 2005 to 2015, approximately 94% of new hirings were on the alternative (part time) basis.**

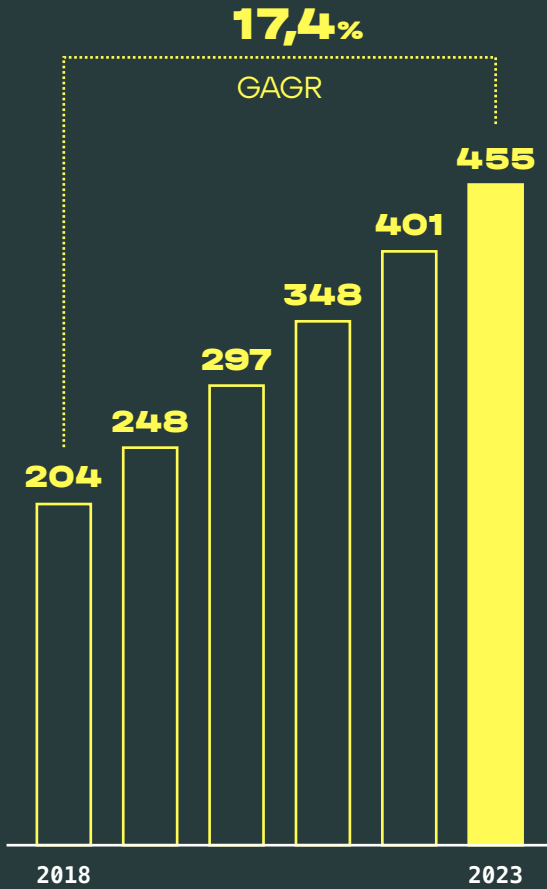
With the same growth rate as was in 2017, by 2027, a number of freelancers in the US should exceed that of officially employed workers.



Sources: businesswire.com; businesswire.com; slideshare.net/upwork; nbcnews.com; medium.com/rsa-reports; gomedeici.com; brinknews.com



Projected gross volume of the gig economy, \$ billion

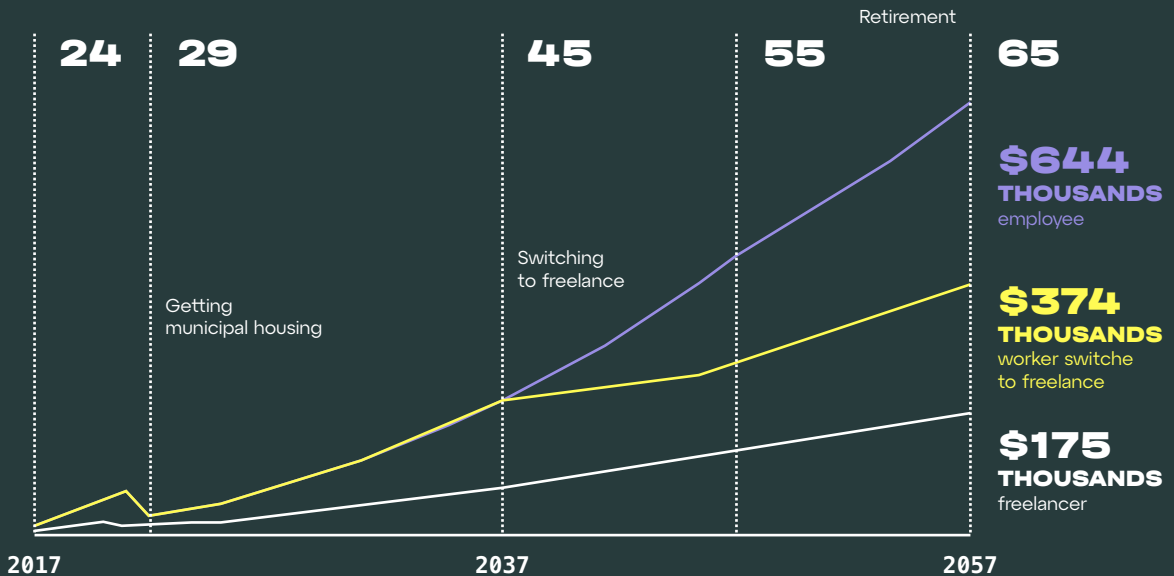


While new business models make easier people’s access to jobs and eliminate intermediaries from the value chain, thus making it more efficient, they also wipe out social security system that is guaranteed by traditional employment.

### WHY DOES IT MATTER:

A larger number of people engaged in gig economy is followed by the growth of precariat, population strata that almost entirely depend on digital hiring platforms that do not enter into traditional labor agreements and are not bound by any obligations to workers who get vitually commoditized.

Forecast of pension savings for 65-year-olds for three scenarios, with an initial earning of \$2,900



# GIG PLATFORMS ARE CHANGING THE SYSTEM OF SOCIAL SECURITY

Digitalization and IT platforms are the catalysts for a process known as commoditization — the conversion of high value added products to the commodity category with respectively lower margin.

**As a rule, commoditization comes along with the sincreased affordability of production, reduction of human labor value or share through increased technology availability.**

The process of commoditization manifests itself in both manufacturing and service sectors. Platforms in this sphere secure one in finding a contractor.

Gig platforms do not serve for freelancers as employers, neither do they undertake any related social obligations which gives rise to a new social stratum — «precariat», precarious proletariat.

The most well known of such platforms, Uber, regularly finds itself involved in lawsuits with drivers and authorities concerned about growing social tensions. Thus, in March 2019, Uber paid out \$20 mn to taxi drivers who claimed to be full time employees instead of independent contractors as the company considered them. In the run up to the IPO, the company settled the class action lawsuit pre trial, but did not admit it was wrong, which would have set a precedent.

**At the same time, there is already a noticeable trend towards the emergence of new social security tools for part time workers, such as the Alia savings system.**

Gig platforms themselves are also paying more attention to their members and putting them at the focus of their communications.

# IT'S 2020 ALREADY, BUT WE'RE STILL NOT IN THE FUTURE

Old bridges are burned, but the new ones are not built yet. Soon, humankind will face the strongest challenges in its entire history, and we hope to be able to cope with them...

## HOW THE LAST 50 YEARS WERE DIFFERENT FROM THE REST OF HUMANKIND HISTORY?

### 01

Incredible leap in the number of people on planet Earth (from 2.5 to almost 8 bln)

### 02

It is not a natural increase, we simply live longer now

### 03

Migration plays ever greater role in economies

### 04

The advent of the Internet made everybody connected and generated an enormous volume of data

### 05

There is much more information than ever but it is not structured and it is more difficult to process and to verify it

### 06

People spend more time in the web but get more lonely and unhappy

### 07

Data became the “new oil” for which common people, corporations, governments, and criminal world compete

### 08

Innovations in every industry are adopted almost instantly (within 3 to 5 years instead of couple of decades)

### 09

The emergence of various robotics systems and artificial intelligence was meant to make our lives easier and to improve labor productivity

### 10

As a result, the majority of people throughout the world is at risk of losing job or be forced to retrain to join creative community within the new gig economy.

Part 2

# DISBALANCED AND DIVIDED



# INEQUALITY IS THE KEY CHALLENGE OF THE 21<sup>ST</sup> CENTURY

Over the past 30 years, human's life on Earth has improved significantly. We live longer, we use new technologies that make our work and life easier, there is much more information, and access to it has become possible from almost anywhere in the world. Several generations of people never witnessed global wars, and humanity issues make front pages of the media.

But is everything so rosy in reality?

**Being inside the filter bubble created for each of us by digital media platforms, we lost sight of how global trends affect life both in distant parts of Earth and near us.**

The Second Chapter of our study is devoted to the imbalances caused by the megatrends described earlier.

We will show how deeply they are rooted on every level — global, crossborder and in every specific country and neighborhood where residents can belong to different worlds.

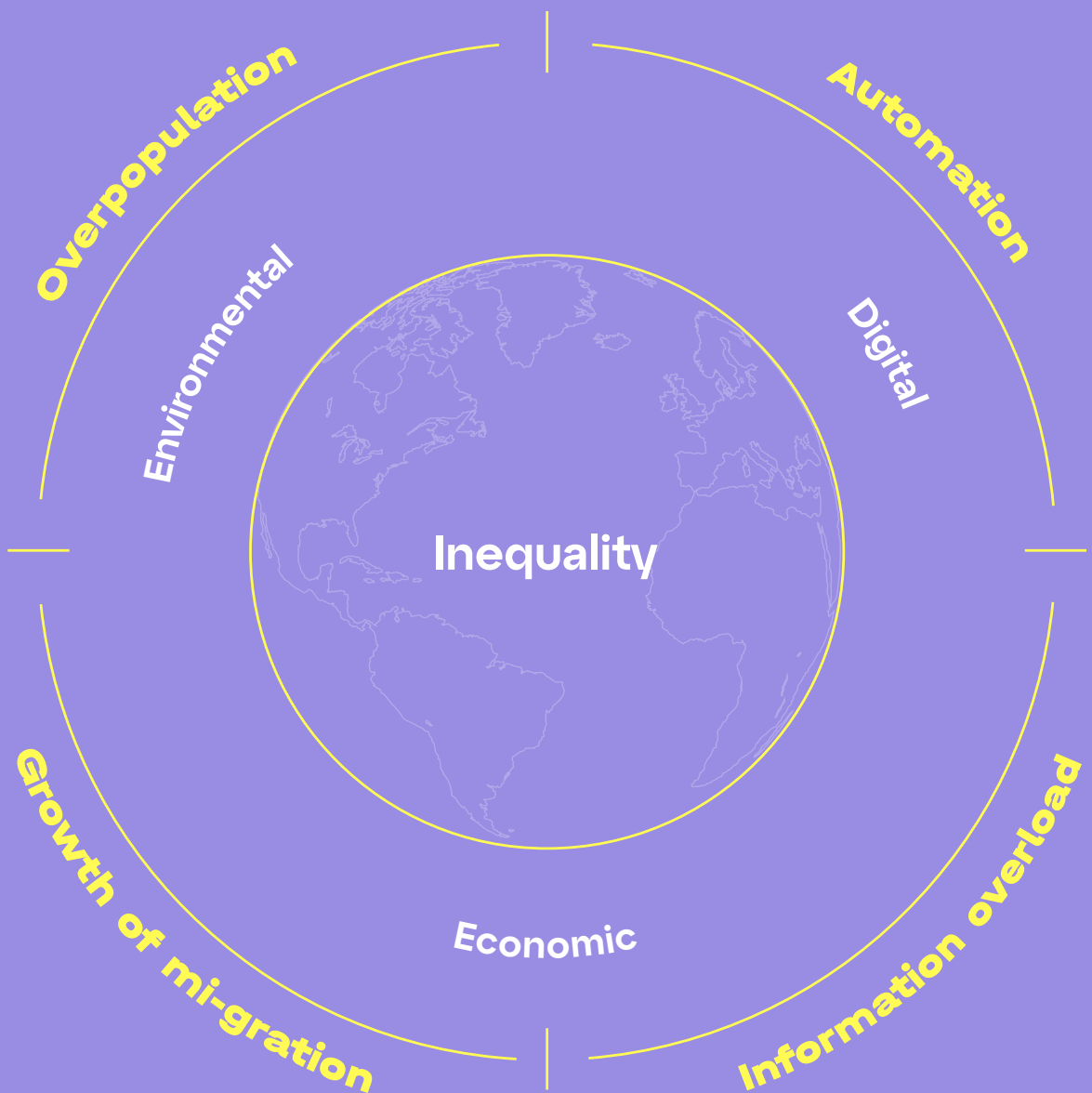
**Inequality is a key concept of the 21st century and a key challenge the world, nations, and individual people are facing today.**

For a long time, it was a common practice to reduce inequality to economic indicators, treating it as a temporary phenomenon that would disappear along with capital accumulation.

However, today it also manifests itself in those spheres where the gap is much more difficult to bridge, such as access to knowledge and environmental human rights.

Inequality is no longer a problem for the “poor”, as evidenced by the “happiness crisis” in mature economies that have long existed at the expense of the less well-off ones.

In this section, we will show how much imbalances have infiltrated into our society and what was the trigger for their explosion all over the world.



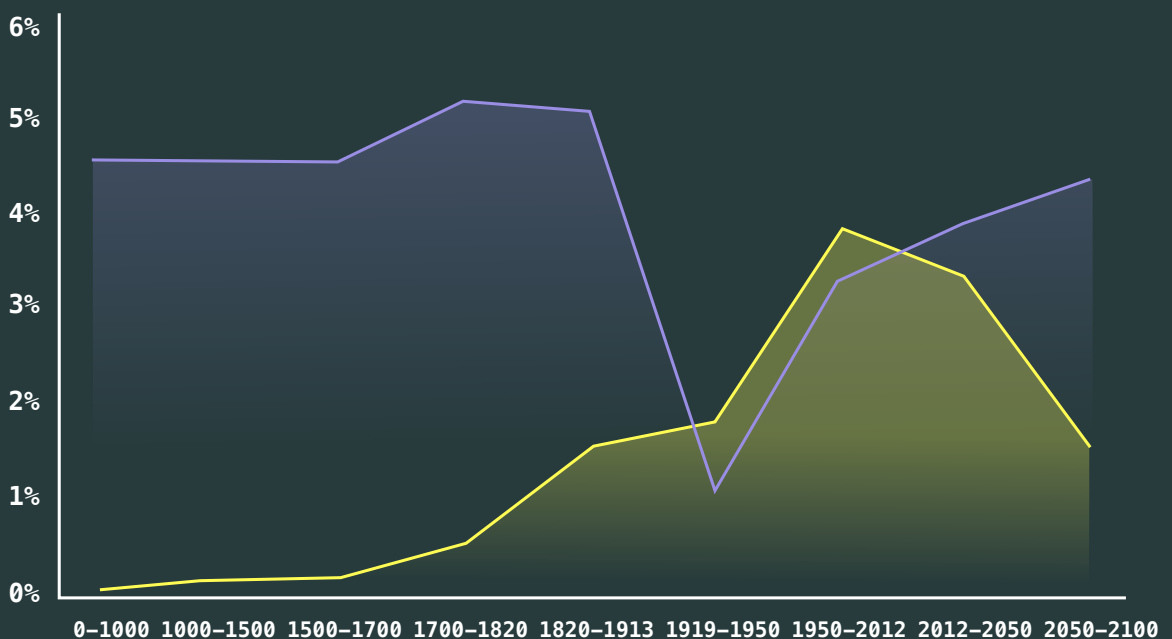
# ECONOMIC INEQUALITY IS INCREASING AROUND THE WORLD

The beginning of the 21<sup>st</sup> century was a time of growth for emerging economies and their residents. In this context, in 2000–2014, the developed countries share in the global GDP shrank from 80% to 71% while inequality between different econo-

mies mitigated. However, inequality within individual countries, especially in mature economies, grew substantially in the same period as an aftermath of economic crises and stagnation of the global DGP growth.

## After-tax rate of return and global economic growth, since antiquity to 2100

■ Rate of return (after taxes and capital losses)  
■ Growth of world production



Sources: mckinsey.com; newyorker.com; worldbank.org; wealthx.com; credit-suisse.com; credit-suisse.com



**Thomas Piketty, a prominent economist, states that inequality is reflected in the difference between the return on capital and economic growth.**

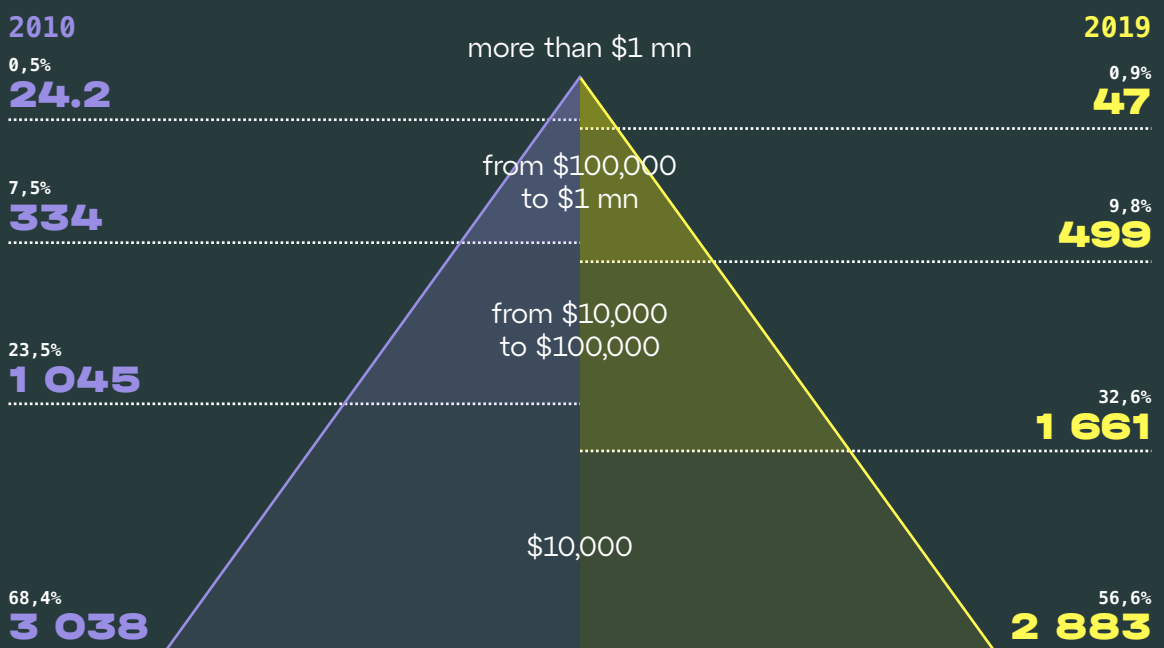
**In the 20<sup>th</sup> century, the difference was positive, which helped reduce inequality, but in the 2010s, this process reversed, and according to his projections inequality may continue growing until 2100 and beyond.**

The growth of inequality is reflected in the fact that the total wealth of the people whose net worth is above \$ 1 million increased 2.3 times in 2010–2019, while their number grew just 1.9 times. Over this period, the global GDP has grown by mere 1.3 times. In 2019, one per cent of the total population possessed 44% of the global wealth.

In the same period, the average net worth of people owning less than \$ 10,000 went from \$ 2,700 to \$ 2,200, and their share in global capital shrank from 4.2% to 1.8%. Therefore, despite the moderate decrease in the number of the world’s poorest, their situation has worsened to a yet larger extent. The rich got richer, while the poorest even poorer.

**Changes in wealth distribution over groups**

Number of adults, mn (%of the total population)



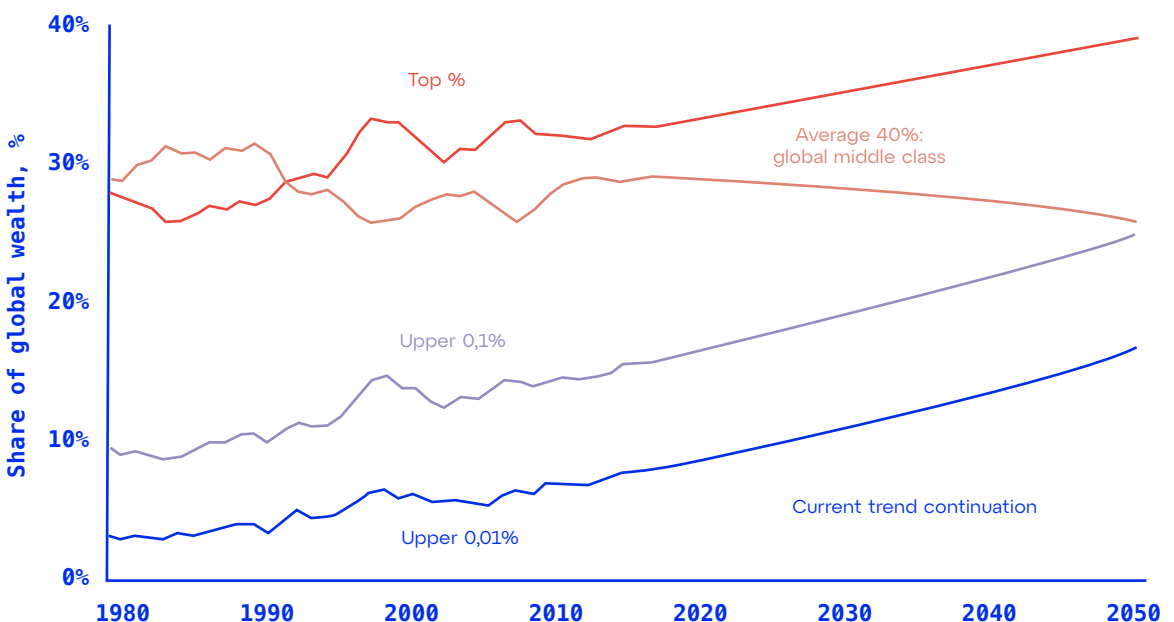
# SOON, MIDDLE CLASS MAY BECOME AN “ENDANGERED SPECIES”

**For a long time, the concept of middle class was an ideological tool of Western countries in their struggle against the Eastern bloc and a source of inspiration for their citizens: a promise of a spacious home, career growth, and a better future for their children. Today, the middle class is progressively losing its importance.**

The data for OECD countries show that the once prosperous class has largely lost its ground. The ratio of the total income of the middle class to that of the affluent stratum went from 3.9 in 1985 down to 2.8 in 2015.

It also has become harder to join the middle class. In the US, 68.4% of baby boomers, 63.7% of Generation X and only 60.3% of Millennials consider themselves belonging to the middle class.

Shrinking of the global middle class's share in global wealth, 1980–2050



Sources: oecd.org; econlife.com

**Belonging to the middle class traditionally used to translate to purchasing power, access to such essentials as housing, health care, and education. However, the cost of these benefits has grown significantly faster in recent decades than the income of the middle class.**

Higher barrier to the middle class became a crucial factor. Twenty years ago in the OECD, only 1/3 of the middle class had high-skilled job, today, the number is 2/3. Moreover, at that time, a family needed only one whitecollar earner to remain in the middle class; today, there are very few families with just one bread winner.

If that is not enough, job of every sixth middleclasser may get extinct through automation.

Average change in income and expenses over the past 30 years, %

Household income



Housing price



Health care costs



Tuition costs

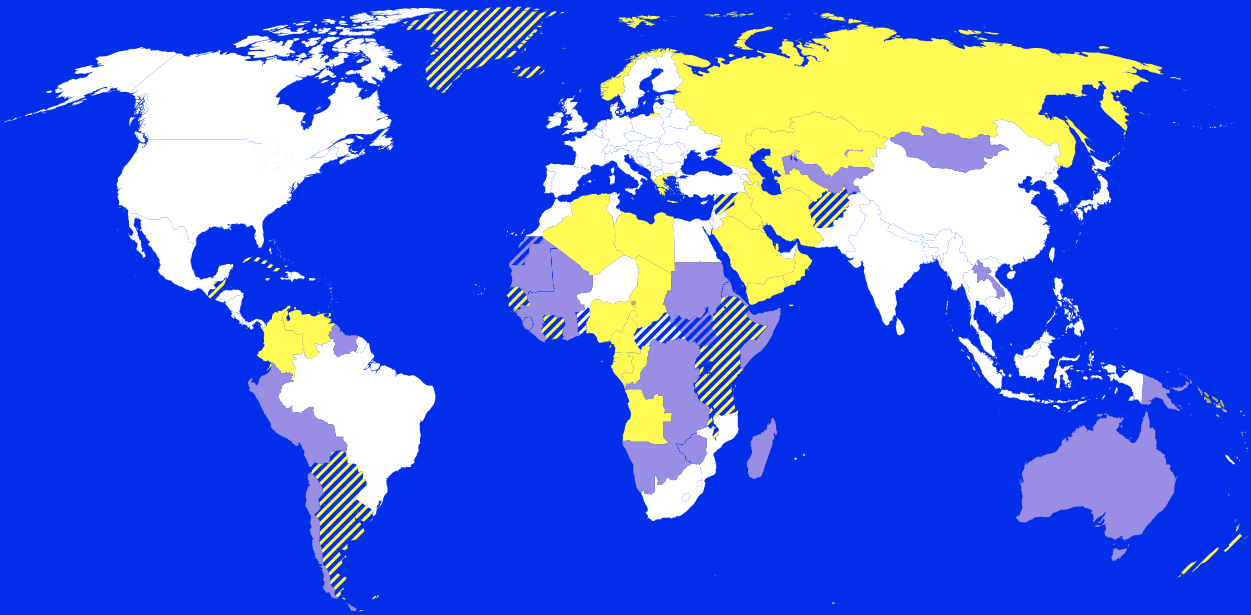


# INEQUALITY BETWEEN NATIONS IS EMBEDDED IN THE STRUCTURE OF GLOBAL TRADE

Inequality among the residents of different countries is embedded in the division of labor and the structure of global trade. Services account for a large share of mature economies' exports while emerging economies mainly export energy materials, agricultural products, and metals.

## Main exported goods, 2018

- Food
- Fuel
- Precious stones, metals and ores
- Agricultural products
- Finished goods
- No information



Sources: [credit-suisse.com](https://www.credit-suisse.com); [unctad.org](https://unctad.org); [unesco.org](https://unesco.org); [weforum.org](https://weforum.org)

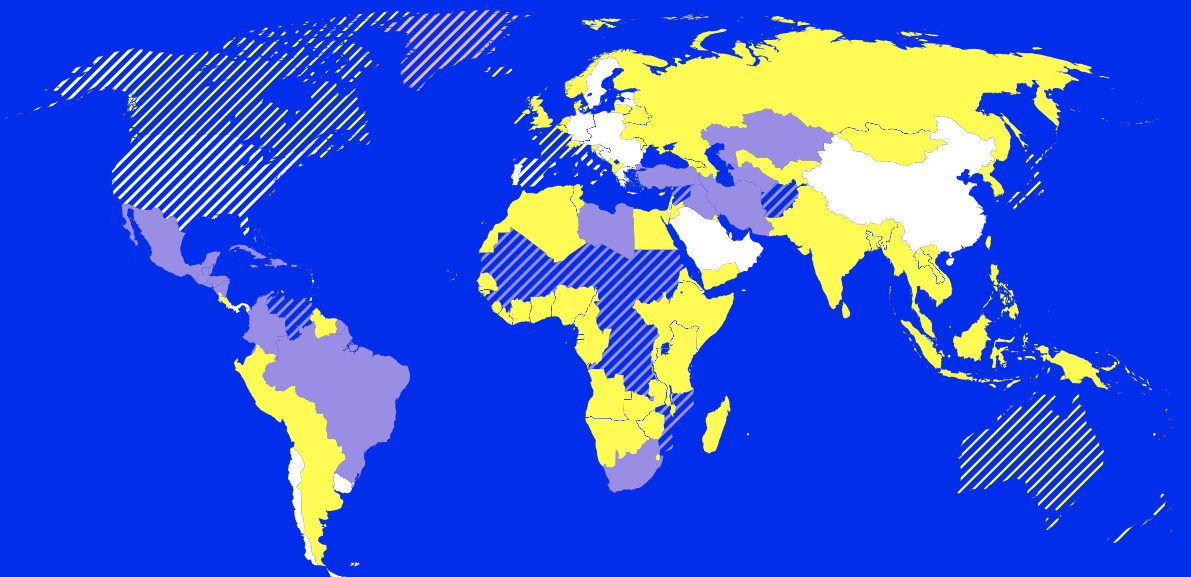
The difference in production structure is the factor for the gap in median wealth per adult:



Capital per capita worldwide, 2019

Median value (\$)

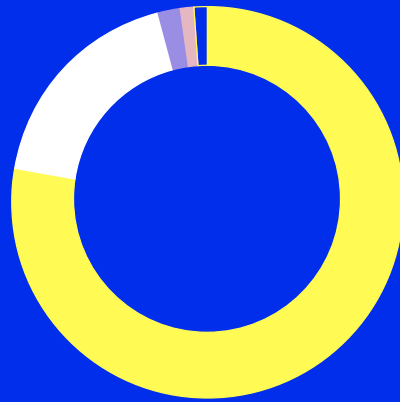
- / \$100k +
- \$10-49,9k
- \$1-4,9k
- / below \$500
- / \$50-\$99,9k
- \$5-9,9k
- / \$500-999
- / n/a



**The structure of global service trade also contains factors for remaining inequality between countries. Developed countries with about 17% of the world's population account for 78% of global exports of services in such spheres as finances, intellectual property, and business management.**

Export of insurance, financial and other services, intellectual property by country group, 2018

- Emerging economies: Africa
- Emerging economies: Asia and Oceania
- Advanced emerging economies: America
- Emerging economies:
- Mature economies



The scale of this gap is very evident in the cultural industries: In North America, each person engaged in culture and media generates 2.3 times more revenue than in Asia and 5.5 times more than in Africa. This reflects not only the degree of development of the cultural component in different economies but also their vulnerability to labor automation.

Share of GDP	Revenue, \$	Jobs	Region
North America	<b>620 bn</b>	<b>4,7 mn</b>	<b>3,3%</b>
Europe	<b>709 bn</b>	<b>7,7 mn</b>	<b>3%</b>
Asia-Pacific	<b>743 bn</b>	<b>12,7 mn</b>	<b>3%</b>
Latin America and the Caribbean	<b>124 bn</b>	<b>1,9 mn</b>	<b>2,2%</b>
Africa and Middle East	<b>58 bn</b>	<b>2,4 mn</b>	<b>1,1%</b>

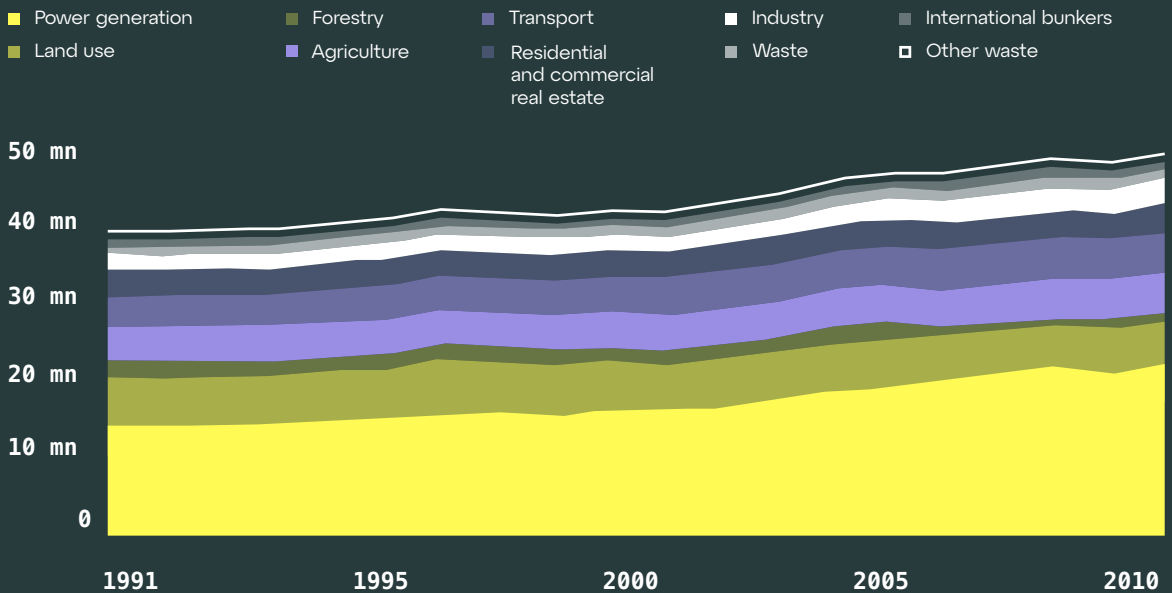
Sources: credit-suisse.com; unctad.org; unesco.org; weforum.org

# THE CURRENT STATE OF THINGS ENTAILS ENVIRONMENTAL INEQUALITY

Inequality between people in different countries is inherent in the division of labor and the structure of world trade. Services account for a large share of mature economies' exports while emerging economies mainly export energy materials, agricultural products, and metals. The largest economies with high concentration of manufacturing enterprises and high level of consumption are mainly responsible for environmental pollution.

However, agriculture and forestry, being the backbone of the poorest economies also significantly contribute to emissions of the greenhouse gases, primarily methane and nitrogen oxides that account for 23.2% of the overall emissions.

Global greenhouse gas (CO<sub>2</sub>) emissions by sector



Sources: bp.com; wri.org; ourworldindata.org

The inequality is evident in energy consumption. In North American countries, the energy consumption per capita is almost four times higher than in Asian countries, and 15.5 times higher than in Africa.

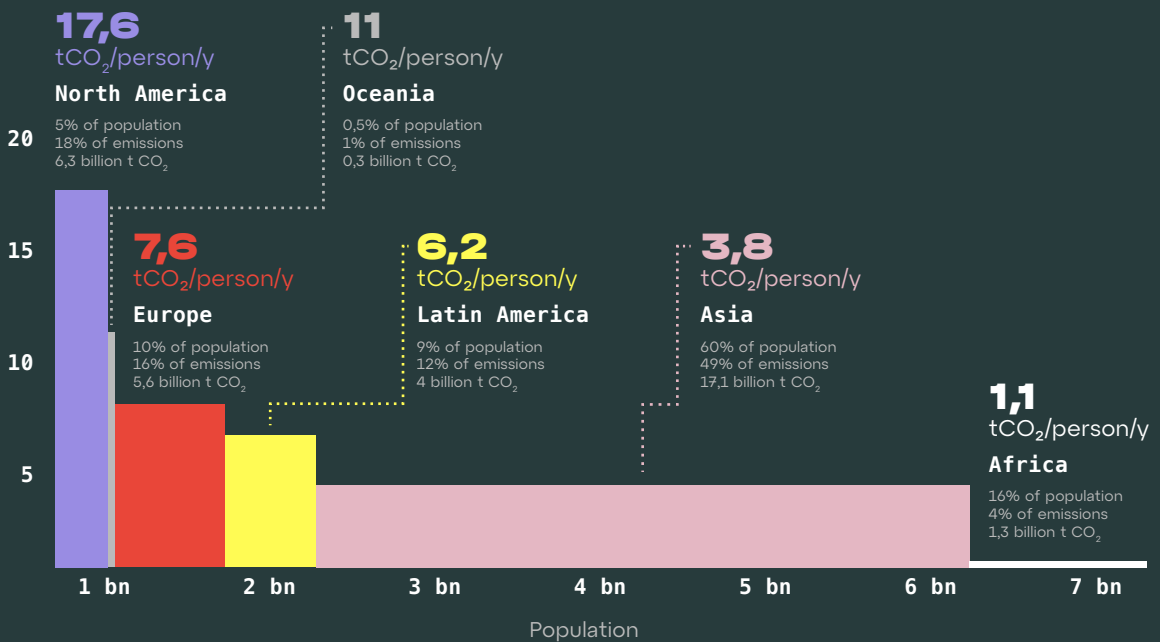
**In absolute terms, the US consumes 3.3 times more energy than all countries in South and Central America, while Japan consumes just a little less than all of Africa which is 10 times more populated than that of Japan.**

Although the contribution to the greenhouse effect is usually assessed at places where carbon dioxide is emitted, the analysis of the geography of consumption of the goods produced in those places shows quite a different picture.

**With this adjustment, the contribution of high income countries with 16% of the world's population goes up from 39% to 46%.**

### Region

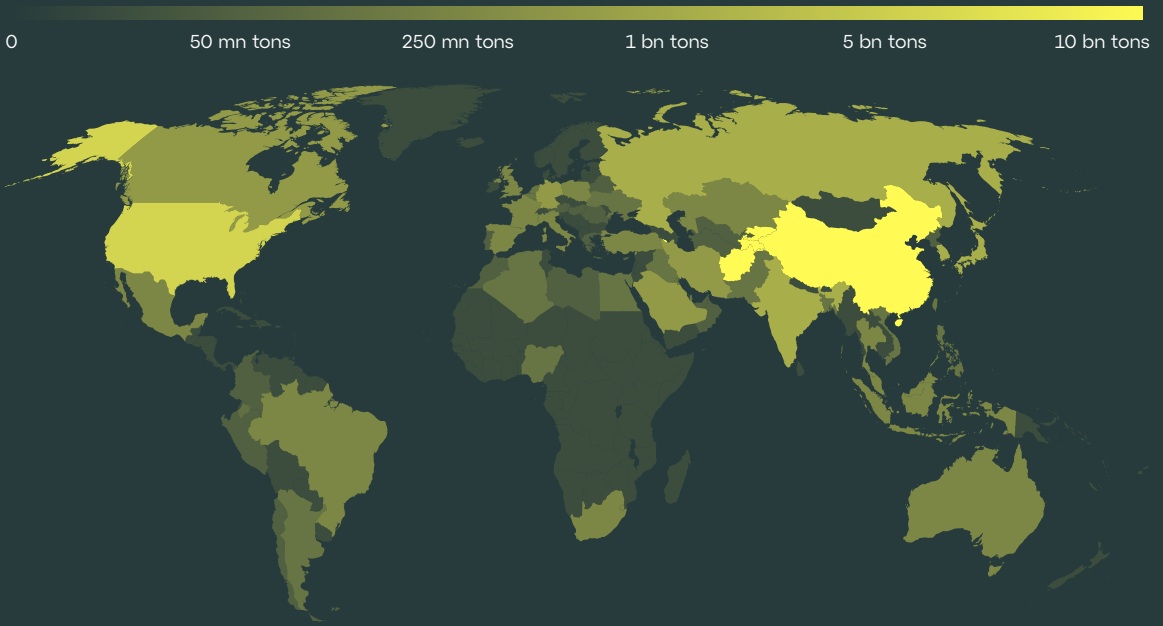
Per capita carbon emissions, tCO<sub>2</sub> per year



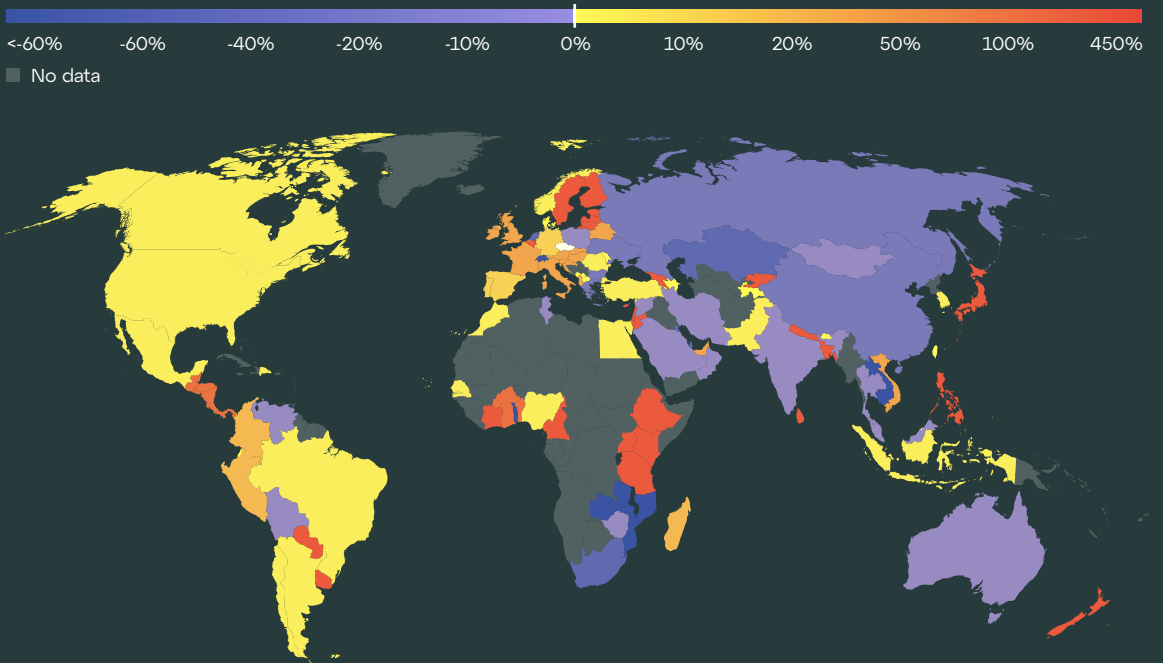
Sources: bp.com; wri.org; ourworldindata.org



Countries that emit the largest amount of carbon dioxide into the atmosphere, 2014



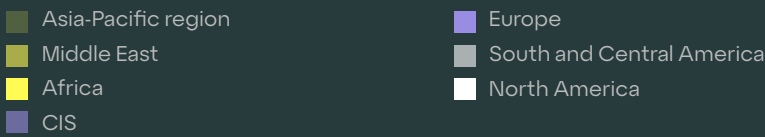
Carbon dioxide emission embedded in imported products against domestic carbon dioxide emissions (if the value is below 0%, such economy exports more products which manufacturing contributes to CO2 emission than it imports), 2014



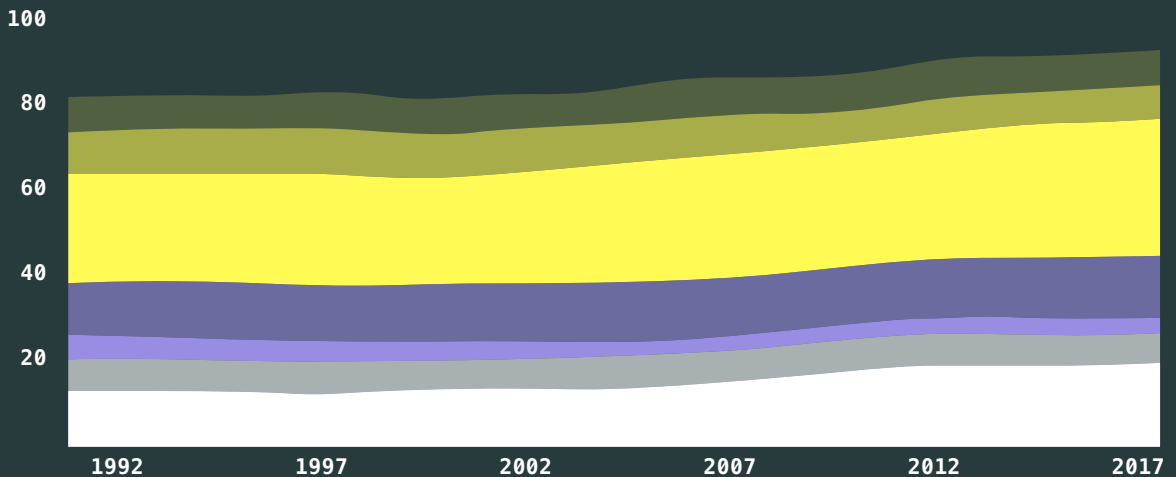
The imbalance in the production and consumption of energy resources, especially oil and gas, as well as related carbon dioxide emissions in various regions of the world is bound to grow. As Asian economies develop, with China seeking to reduce coal fired power generation, and Africa's population grows, while people in many places

still have no access to electricity, the imbalance will continue to aggravate.

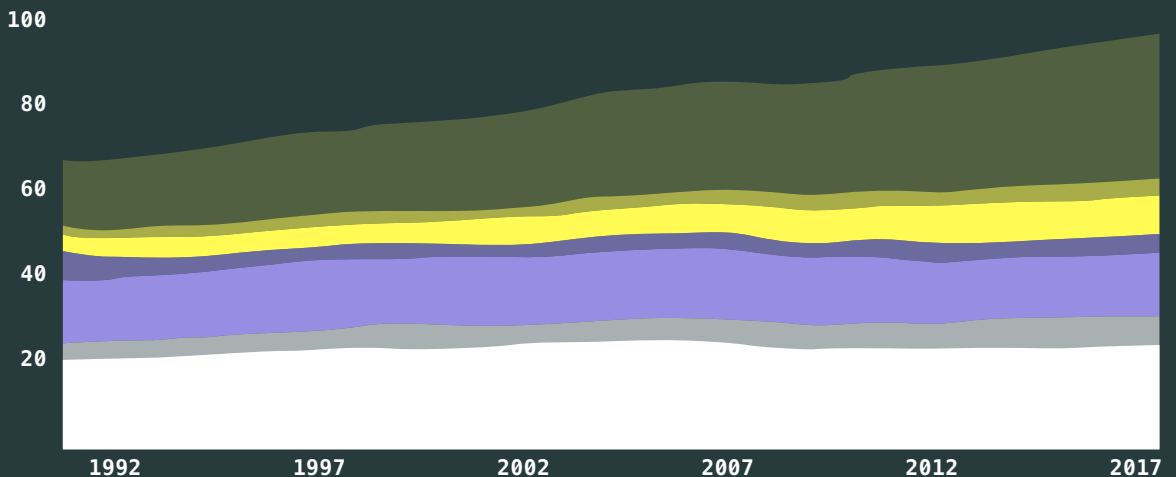
Urbanization in developing countries that calls for affordable energy resources will be another important factor. This will add tension into their relations with mature economies that invest in the "green" economy.



Oil: production by region 100



Oil: consumption by region



Sources: bp.com; wri.org; ourworldindata.org

# ABNORMAL WARMING AFFECTS THE ENTIRE WORLD BUT SOME REGIONS ARE IMPACTED MORE SERIOUSLY

**Although the contribution of developing countries to the global warming is still relatively low, it is they who will be affected the most.**

Mature economies are mostly located in temperate zones of the Northern hemisphere where rising temperatures may benefit agriculture as cropland areas would expand. At the same time, the regions that will be most impacted by droughts are Sub-Saharan Africa as well as South Asia.

In addition, global warming enhances the spread of infectious diseases. Those diseases that used to be considered tropical, such as Dengue fever, now endanger much of the globe.

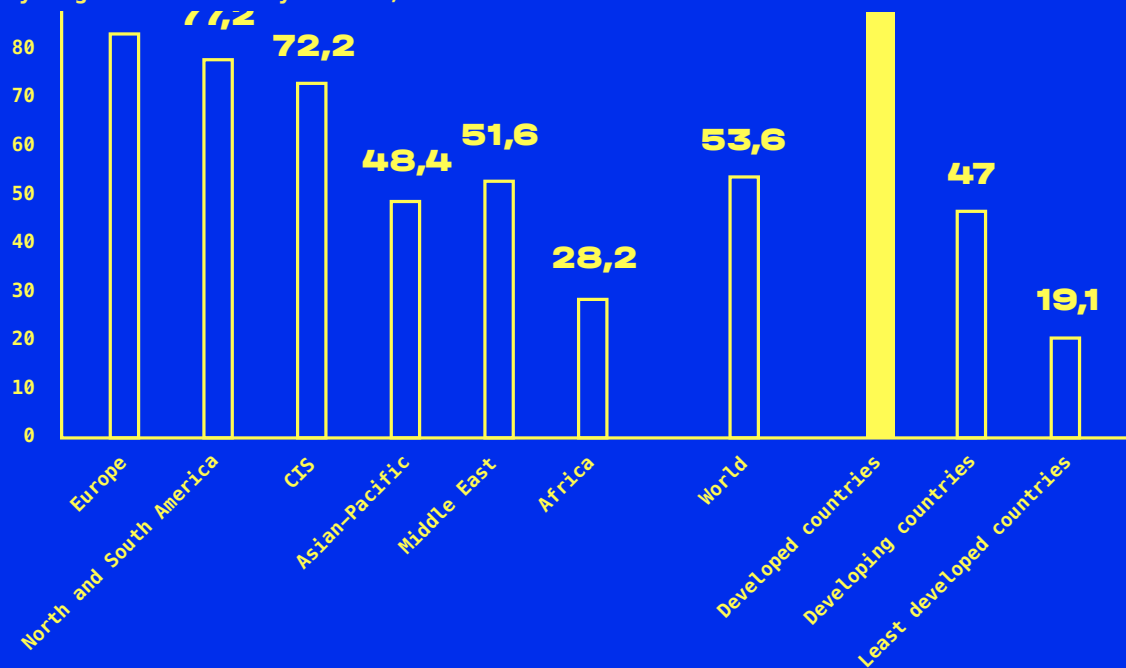
However, the global warming's primary hazard is melting glaciers and rising sea level. According to latest studies, by 2050, rising sea level may affect three times as many people as estimated earlier, endangering some of the world's largest coastal cities.

According to various sources, by 2050, various effects of global warming in total may make from 140 million to 1 billion people, mostly from the poorest countries, climate migrants which would exacerbate the existing burning issue of migration.

# BILLIONS OF PEOPLE HAVE YET TO ENJOY THE BOON OF THE DIGITAL REVOLUTION

Despite the incredible growth in the number of Internet users, billions of people on the planet still live in the “past century”. More than 60% of these people are in South Asia and Africa. The average annual growth of internetization there has already slowed and stagnates around 5%.

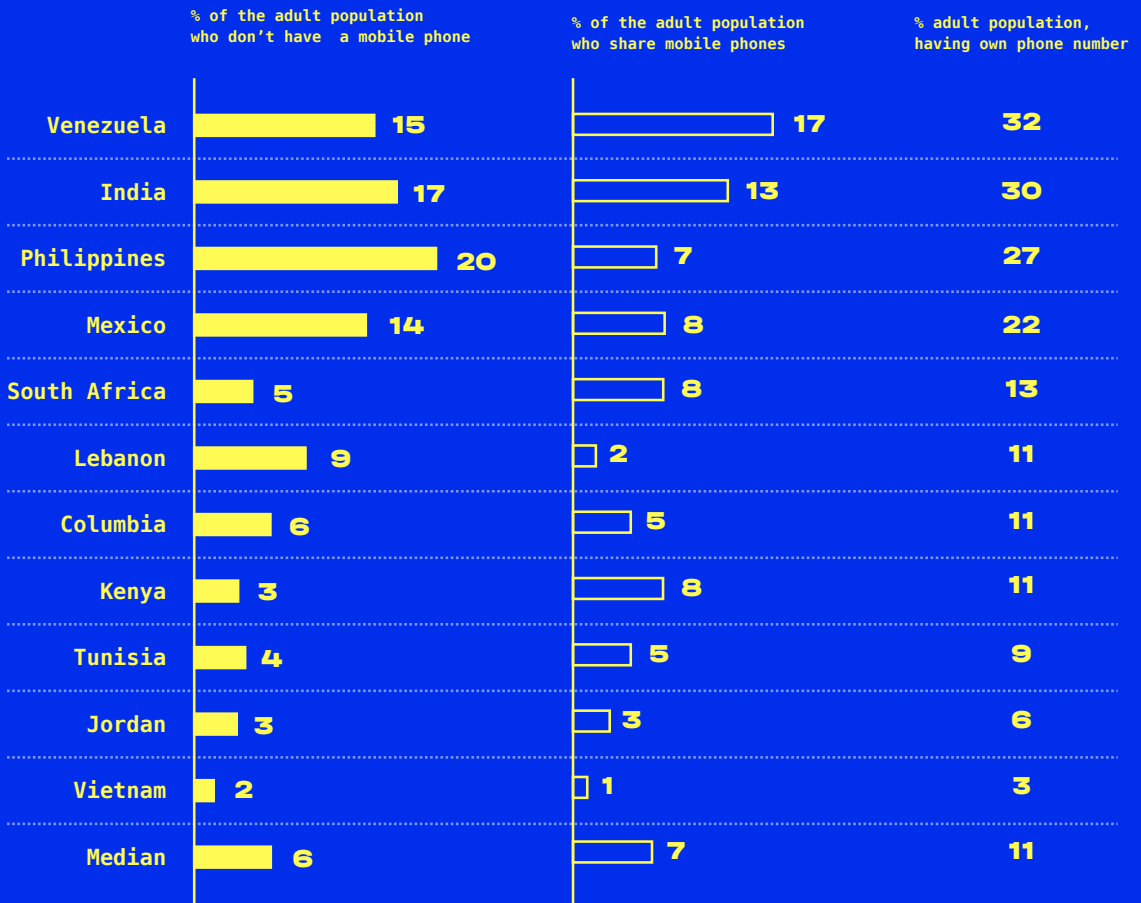
Percentage of people using the Internet  
by region and country status, 2019



In emerging economies, there is still a significant number of people who do not have mobile phones or have to share them with others.

Six per cent of adults on the planet do not use phones, and seven per cent do not own phones having to borrow them from others. In Venezuela, India, and the Philippines, about three out of ten adults do not have mobile phones (32%, 30%, and 27%, respectively).

**In some developing countries many people do not own a mobile phone or have to share one**



Another important aspect of the global digital inequality is the speed of Internet access. So in Yemen, downloading a 5GB movie would take 30 hours in average which is 225 times longer than in Taiwan. Therefore, even in those regions that formally have Internet and mobile communication, the quality of these services may be incredibly low.

# ACCESS TO KNOWLEDGE IS LARGELY LIMITED DUE TO THE DOMINANCE OF THE FEW LANGUAGES

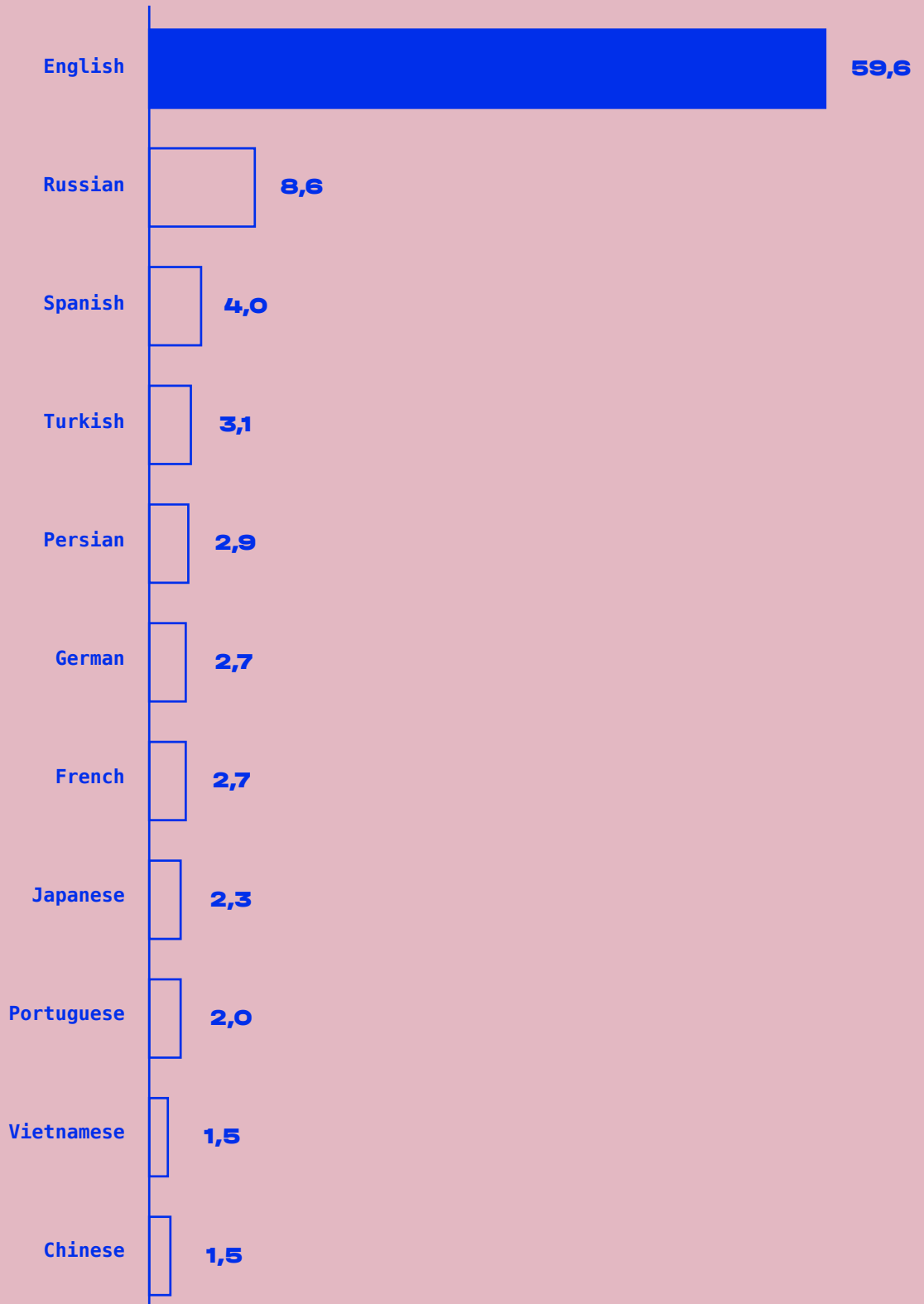
English was the first language of the Internet. By the mid-1990s, over 80% of the web content was in English. While English speakers make up only 26% of the Internet users, more than half of all online information is in this language. Just to compare, 2.7% and 1.5% of digital information is in German and Chinese, respectively. Eighty per cent of digital content is not available in nine out of every ten languages.

The dominance of a small number of countries that mastered new technologies earlier than others also leads to inequality in amounts of educational and informative content. With 40% of the world's population having no access to education in their native language, of the 51 million Wikipedia articles 28 are available in only 10 languages including 5 million automatically translated articles in the Cebuano language. Less than 180,000 articles are in Greek, and there are almost no publications in most of African and Asian languages.

**It is not surprising that the least affluent and advanced countries' contribution to global science is less significant than that of the wealthy ones.**

**In 2018, high income countries produced 56% of research papers, upper-middle income countries (China, Russia, Brazil, and other similar countries) produced 34%, and lower-middle-income countries — the vast majority of countries in the world including India, Indonesia, and Pakistan — produced 9%.**

Statistics on the use of languages on websites, %

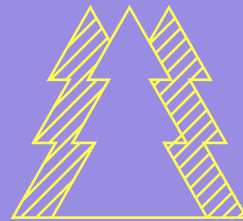


# HAPPINESS IS A NEW TARGET INDICATOR IN MATURE ECONOMIES

In 2008, authorities of Bhutan adopted a concept of “Gross National Happiness” that was incorporated in the country’s strategy. It was based on four pillars:



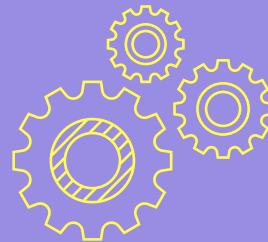
**Sustainable socioeconomic development**



**Environmental conservation**



**Preservation and promotion of culture**



**Good governance**



The nine domains of GNH are:

- psychological well-being
- health
- time use
- education
- cultural diversity and resilience
- good governance
- community vitality
- ecological diversity and resilience
- and living standards.

Taking the example of Bhutan, in 2009, French President Nicolas Sarkozy commissioned a study on a feasibility of using GNH index as a measure of the country's progress instead of GDP; one year later, the British Prime Minister announced that the country would begin indexing happiness along with economic growth.

In 2011, the UN convened the General Assembly that was to define a new, "more holistic approach to development", resulting in a new development index and the annual World Happiness Report.

The demand for a new approach to well-being is determined by the fact that indirect indices of population's situation are not as tied to economic growth as they used to be.

The World Happiness Report found that from 2007 to 2018, life satisfaction in the United States decreased by 6% despite the fact that GDP per capita grew by 31% in the same period.

Another survey found that from 1990 to 2018, the percentage of Americans who consider themselves unhappy rose from 8% to 13%.

These factors indirectly manifest themselves in the fact that psychiatric institutions account for 14% of the total hospital accommodation in the European Union while within the period from 2011 to 2030, depression and mental disorders will take \$16 trillion from the global economy.

**Undoubtedly, even members of wealthy communities cannot ignore the growing inequality around them and globally. Struggle for people and resources, divisive disinformation, and digitalization that endangers employment — all these factors have underlying impact on our psyche.**

Made with Love and Faith in the Future

Part 3

# **FUTURE AT OUR DOORS**



# COVID-19

(Coronavirus disease 2019)

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**63**

**MN PEOPLE**

infected with COVID-19

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**40**

**MN PEOPLE**

recovered

---

**1,46**

**MN PEOPLE**

died from coronavirus

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**186**

**COUNTRIES**

affected by the virus

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Data as of November 30, 2020

**COVID-19 is an acute respiratory infection caused by the SARSCoV2 coronavirus.**

**It is a dangerous disease that may include viral pneumonia among its specific complications. In about one in five cases, the course of COVID19 is severe and accompanied by respiratory distress. According to official data, the rate of mortality from coronavirus infection during the pandemic reached more than 4% of all infected, and in some countries, at the peak of the pandemic, it was as high as above 10%.**

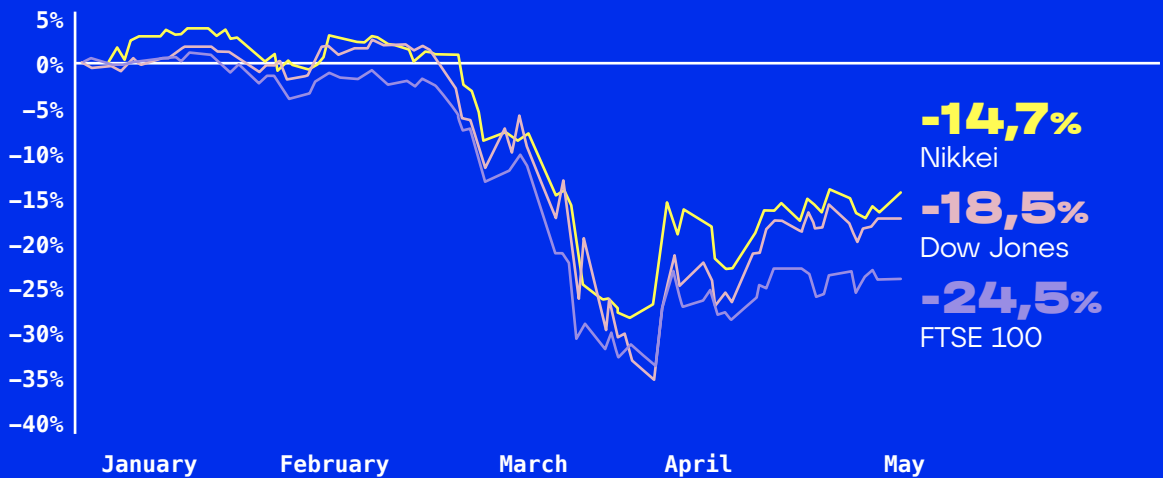
# LOCKDOWN: AS DEVASTATING AS THE VIRUS ITSELF

Coronavirus and the lockdown as a control measure throughout the world dealt a devastating blow to the global economy: restrictions caused a business activity decay by 40–50%.

At the bottom of the decline, Dow Jones and FTSE indices fell by 33–35%.

**In 2020, global GDP may decrease by 5.2% — this would be the worst global crisis since the Great Depression.**

Coronavirus impact on stock markets since the outbreak



Sources: europeansting.com; worldbank.org; rolandberger.com; news.un.org; washingtonpost.com

In the short and medium term, coronavirus endangers the labor market which is critical for the global economy. In the second quarter of 2020, the number of working hours worldwide decreased by 14% which is equal to 400 million lost jobs.

Tourism, aviation industry, and retail (except for consumer goods) have suffered the most from the crisis.

Across the globe, the heaviest blow was taken by businesses engaged in offline services which were completely unavailable during the lockdown.

**This impact was critical for small and medium-sized businesses. More than 100,000 small businesses ceased operations in the United States.**

#### Top five global problems



# OWN STUDY OF THE COVID19 EFFECTS

**These days, coronavirus features in every news break: every day we get reports of the number of new cases and disease victims.**

The pandemic, total panic, lockdown, switching to remote work, layoffs, fines for leaving home, suspension of production and offline business operations — all this is the reality of 2020. The lockdown will be lifted at some point, but what will the world be like then?

What effect will all this have on the economy, politics, and each of us? What difficulties will we face, where to expect them? What major changes should be expected in the near future? And what should each of us do now to mitigate the risks?

Everyone is concerned about these

issues, and we decided to conduct our own study in order to get a better assessment of the crisis impact on the future world.

**The survey was conducted in April-July 2020 among 550 businessmen and professionals. They were asked 10 questions about their idea of the future and their expectations.**

## 550

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businessmen and professionals  
took part in the survey

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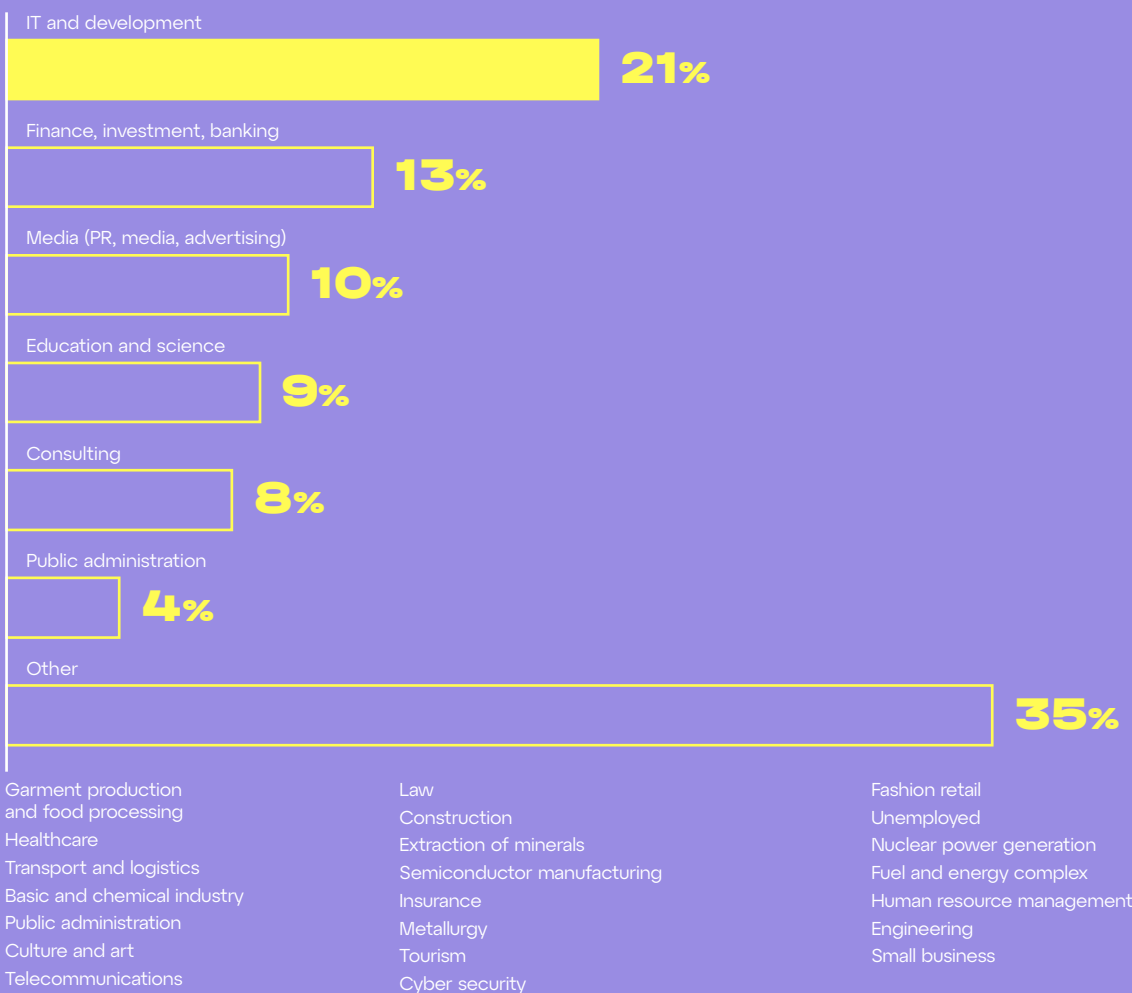


**To give a clear picture of the survey results, we have to give a profile of our respondents: who they were, how old, their occupation and position.**

Most of the respondents live in Moscow and the majority of them (58%) belong to the age group of 24 to 31 years, while the largest percentage of them (20%) work in IT.

Overall, the survey was taken by people from different business sectors, of different positions, and from companies with different staff strength. This allowed us to obtain a fairly representative result to further analyze it and formulate conclusions.

### Industry you work in



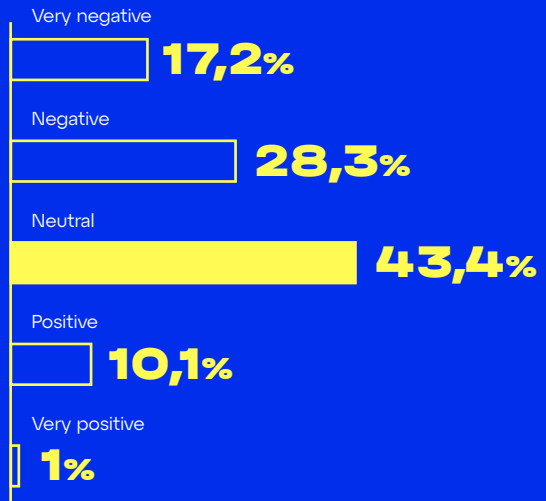
# 45% OF RESPONDENTS CONSIDER THE CORONAVIRUS IMPACT ON THEIR COMPANY AS NEGATIVE

When answering the question “how did the coronavirus affect your company?”, most of respondents’ opinions were either negative or neutral. When sorted into age subgroups, the largest percentage of “very negative” responses was given by people of 42 to 64 years of age, while people under 23 years of age believed (21%) that the coronavirus had a rather positive impact on their company.

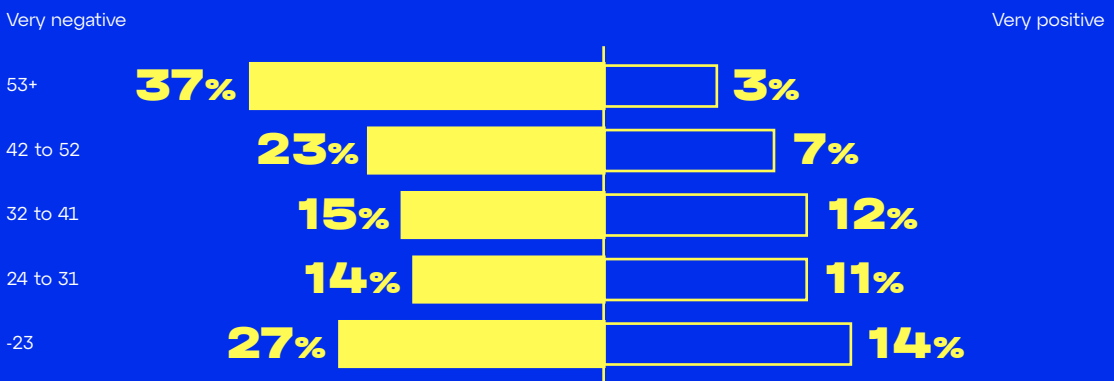
**The worst impacted sectors are tourism, restaurant business, and education. IT, advertising, and public companies were less affected.**

A large number of respondents from the banking and finance sector also pointed a large negative impact on their company.

**What was the coronavirus's impact on the company you work in?**

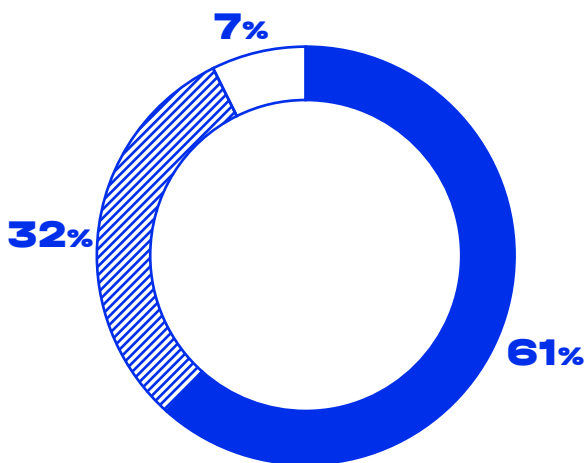


**How do different age groups interpret the current situation?**



# 93% OF RESPONDENTS EXPECT THE LOCKDOWN EFFECTS TO CONTINUE FOR A YEAR OR EVEN LONGER

Do you think this impact will continue for a longer period?



- The impact will be significant**  
 The impact will be significant. Businesses and the public will feel the effects of the lockdown in the coming year
  
- The impact will be crucial**  
 We will see strong structural changes in economy and people's lives in the next few years
  
- The impact will be not significant**  
 The negative effect will disappear as soon as the lockdown is lifted

When asked about the duration of the effect, 61% of respondents thought that the coronavirus effects will remain significant for at least a year, and 32% of respondents had more pessimistic views: they believed that the impact will be crucial, and there will be strong structural changes in economy and people's lives in the next few years.

And only 7% are inclined to believe that neither we nor the economy

would be impacted, and the world will immediately get back to normal once the lockdown is over.

**Respondents from such spheres as PR, television, education, and public administration have the most positive views.**

# CRISIS AND SOCIAL STRATIFICATION AS THE FUTURE OF HUMANITY

What challenges will humanity face in the next few years?

---

**76%**

**Global economic crisis**

The respondents expect a crisis both in economic (76%) and political spheres (56%), as well as a significant social stratification (64%). The opinion about the economic crisis is shared by almost all age groups.

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**56%**

**Crisis of political systems**

Respondents in the age between 32 and 41 years are more inclined to agree about the existence of a political crisis which may indicate their disagreement with the current political system. Respondents over 42 are more concerned about the devaluation of education and, as a result, the lack of highskilled personnel.

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**64%**

**Social stratification**

The poor get poorer, the rich get richer: respondents expect large economic stratification and inequality. Interestingly, compared to other age groups, Millennials more often point at the problem of the critical impact of breakthrough technologies on people's lives.

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# REMOTE WORK IS THE MAIN TREND FOR THE NEAREST FUTURE

**What can be the main change in a person's life in the next few years?**

**62%**

Massive switch of employers to remote work and flexible formats of employment

**39%**

Devaluation of "traditional education" and emergence of online alternatives

**25%**

More focus on psychological health than physical health

People aged from 32 to 41 more than others believe that traditional education is losing its value.

They are more positive about the ability of schools and universities to switch to the online format. People in the 42 to 64 age group believe that there will be an increase in shared consumption instead of ownership: the lockdown will lead to a drastic shrink of incomes, while shared consumption is more cost efficient.

One of the main changes is that most people focus more on psychological health rather than on physical health. All those could be the effects of isolation and permanent bans. The

number of psychologist consultations in Russia during the lockdown grew by 69% compared to 2019. There is also a trend of emergence of local communities caused by the movement restrictions; there is a chance they will remain in the future. To minimize social contacts, we more and more contemplate switching to virtual/augmented reality, which is growing in popularity.

People's settled way of life caused by isolation can prove to be more comfortable and cost effective. 62% expect more flexible working conditions.

**Massive shift to remote work is a trend that may stay with us even after the end of the pandemic.**

The planet will certainly benefit from this: less movement means less emissions into the atmosphere; remote operations consume less energy.

# UPGRADE YOUR SKILLS TO MANAGE YOUR RISKS

How do you plan to manage your personal risks?



Although, unsurprisingly, people under 42 are more concerned with work than those older, due to the coronavirus, we all give more and more focus on our health. Is this awareness or just fear? Will the habits of regular hand washing and treating purchased goods with antiseptic remain with us?

The lockdown limited our personal communications leaving us on our own. Some people felt lonelier which later may result in mental disorders. All the groups of respondents, and especially the category under 23, identified the expansion of contacts as a means of neutralizing this phenomenon. It also refers to numerous freelance opportunities that opened thanks to remote work.

Most of the respondents see the main strategy for managing personal risks as improving their skills in their current profession. In addition to skill development, expanding contact network and taking care of own health, which ranked in the first three positions, the respondents also singled out investing as a possible strategy that might allow to receive passive income in the context of unstable labor market.

# BE MORE FLEXIBLE AND INVEST IN YOURSELF

Based on our research, we can see that in the current situation, apart from negative aspects such as economic and political crises, impoverishment and social stratification, many people see positive ones: the opportunity to spend more time with family, get additional education and improve skills, take care of own health and expand network of contacts through online communication.

**A fairly large percentage of respondents do not consider the changes critical.**

**We believe that all this will end one day and leave us not only new difficulties, but also with new useful skills.**

# WE INTERVIEWED 33 OPINION LEADERS FROM VARIOUS SECTORS ABOUT WHAT THE FUTURE HOLDS FOR US

— **GRIGOR BADALYAN**

Co-founder, Strategy Director, Stellar communications agency

— **GRIGORY BAKUNOV**

Director of Technology Distribution, Yandex

— **DMITRY BALVANOVICH**

Partner, Head of the Russian division, MoviePark

— **ALEXANDER BAUROV**

Writer, columnist, former Acting Director of the Research and Analytical Center of the Roscosmos State Corporation

— **DAVID BINTSENE**

Film director, founder of the POST TRIBE Agency

— **ROMAN VARNIN**

Musician, producer, director, member of the Malbec band, founder of the MLBC label

— **YEVGENY VOLKOV**

CEO, AITU DALA video hosting

— **SERGEY VOLODENKOV**

Doctor (habil.) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

— **ANDREY GOLOVANOV**

Head of the Department for Development of the Centre of Expertise for Major Construction Projects (CEMCP), Rosatom

— **VLADIMIR GOLUBYATNIKOV**

Head of Investment Planning, Eurasian Resources Group

— **OLEG GUROV**

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

— **NICK JAIN**

IT entrepreneur, India, Forbes Asian 30 under 30

— **ALIONA YELATANSEVA**

Curator of the UX/UI course, British Higher School of Art & Design

— **NADIA ZHEKSEMBAYEVA**

Founder of Reinvention Academy, scientist, speaker and author

— **ROMAN ZARIPOV**

Founder of OUT DIGITAL Agency



- **ANDREY KUPREYEV**  
World and European champion in Jujutsu, owner of the GYMNASIUM chain of sport clubs and gyms
- **MATVEY KUKUY**  
Co-founder and CEO, graduate of the 500 Startups accelerator, AMIXR
- **OLEG MALYSHEV**  
Head of Strategy, Russian Post
- **GRIGORY MASTRIDER**  
Blogger
- **AYRANA MONGUSH**  
CEO of Mathhub, Mentors.ru
- **ALEXANDER NENASHEV**  
Head of pdupd.co bureau, lecturer with the British Higher School of Art and Design and Skolkovo
- **DMITRY POYARKOV**  
Deputy Head of CSR and Brand Management, Severstal
- **SEYFEDDIN RUSTAMOV**  
Majority Shareholder of PJSC Metafrax
- **MIKHAIL RYKHTIK**  
Professor of the Russian Academy of Sciences, Director of the Institute of International Relations and World History of Lobachevsky State University, Nizhni Novgorod
- **TIMOFEY SERGEYTSEV**  
Political consultant, philosopher, representative of the methodological movement
- **NIKITA STASHEVSKY**  
Modern Work specialist at Microsoft
- **CHARLIZE THERON**  
Actress
- **OKSANA FETISOVA**  
Head of the Corporate University, MTS
- **NELLY HOLMES**  
Member of the Golden Globe Award Panel
- **TOM HANKS**  
Actor
- **VADIM CHEKLETSOV**  
Executive Director of the Russian IoT center, Research Associate with the South-West State University
- **YAROSLAV SHUVAEV**  
Chief Internal Innovations Officer, AK BARS
- **VLADIMIR YAKUNIN**  
Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habil) of Political Studies

# THE WORLD IS AT THE CRITICAL POINT: WHO WILL COME OFF WITH FLYING COLORS?

The time has come when you either soar or sink. The gap between strong and weak market players is broadening at the speed of light. Therefore, now more than ever we have to muster our strength and move forward.

## **Seyfeddin Rustamov,**

Majority Shareholder of PJSC Metafrax

Like any crisis, this one gives the strong and smart a chance to rise, and to the weak and sick a chance to step aside.

## **Mikhail Rykhtik,**

Professor of the Russian Academy of Sciences, Director of the Institute of International Relations and World History of Lobachevsky State University, Nizhni Novgorod

In a recent interview, French President Emmanuel Macron described the current situation as a “profound anthropological shock.” Indeed, today we see widespread deviations from the usual way of life primarily as it relates to human nature, including those aspects that define humanity, such as one’s psychological state, sense of awareness and desire to engage with society. In this sense, the circumstances in which we have found ourselves for such a prolonged period of time – including restrictions on the freedom of movement and the transfer of communications to a virtual environment, where there is no opportunity for non-verbal communication – significantly affect the way of life and thinking of all people.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habilitation) of Political Studies

In the nearest future, those companies will survive that had an opportunity or courage to work during lockdown and those that used the time to strengthen their brands.

## **Dmitry Balvanovich,**

Partner, Head of the Russian division, MoviePark

# NEW CHALLENGES AND A NEW FAULT LINE — THE WORLD IS DIVIDED INTO ONLINE AND OFFLINE DOMAINS

This crisis only deepens the gap between the rich and the poor. Digital reality will be a domain for less affluent users, while offline life will be a privilege for the rich. The gap will get broader. The class that can sustain its own safety will retain the habit of personal interaction. Ties between people of the same circle (private communities) will become tighter.

## **Evgeny Volkov,**

CEO, AITU DALA video hosting

Education and business will go online, and these processes would cause the following issues: adults will appreciate simple human interaction more, while for children, socializing will become a huge problem.

## **Andrey Kupreyev,**

World and European champion in Jujutsu, owner of the GYMNASIUM chain of sport clubs and gyms

There are industries that have passed the point of no return. It is unclear how the tourism industry, airlines and logistics will recover. Business trips and the cost of commercial property will shrink. The attitude toward home will be different as we come to spend most of the time there.

## **Nadia Zheksembayeva,**

Founder of Reinvention Academy, scientist, speaker and author

It's become a commonplace that remote services are going to thrive.

I think that all services related to face-to-face meetings will also prosper, gradually drifting towards premium segments.

## **Vadim Chekletsov,**

Executive Director of the Russian IoT center, Research Associate with the South-West State University

Right now data is the most expensive thing on Earth. Data is an opportunity to manage and impose your own rules of the game. At the same time, there are still two worlds — in one a person would prefer an array of data, in the other — a gold watch.

## **David Hernand Bintsene,**

Film director, founder of the POST TRIBE Agency

# THE INTERACTION WE GOT USED TO IS BECOMING A LUXURY

One of the factors that has a long-term impact on our social life is the deep penetration of digital technologies into our modes of communication, including new media and social networks. As a result of being constantly in the midst of an information flow, people become increasingly dependent on interaction with devices that give them access to this information and the environment that it creates. Fully-fledged communication becomes replaced with pseudo-communication, in which people close themselves off in their own space, and, as a result, significantly reduce the room for constructive interaction with people who hold different views. This ultimately leads to a powerful polarisation of society. Under the influence of restrictions and fears, we see a growing distrust of the physical world and face-to-face forms of dialogue.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habilitation) of Political Studies

The world has changed. The lifestyle of a person during the time of isolation received a strong impetus for changes. Some of the usual services and industries had to migrate to the digital domain to survive the crisis. At the same time, a number of industries will no longer go back offline after the lifting of restrictive measures. In the next decade, there will be a significant trend towards monitoring public health and reasonable social distancing. I would put it this way: offline prices will go up, while online prices will go down. In the near future, we will see a combination of social distance regulations and updated business models. For example, if every third seat in an airplane, cinema or restaurant is removed, with the same level of service quality retained, we will see higher prices.

## **Oleg Malyshev,**

Head of Strategy, Russian Post

The pandemic has shown how interconnected we have become. I really don't like the fact that people are afraid to approach each other on the physical level. Unnecessary fears and limits emerged just like in the Middle Ages. We may get a huge number of mental disorders in the near future, while in the past we learned to trust.

## **Alexander Nenashev,**

Head of pdupd.co bureau, lecturer with the British Higher School of Art and Design and Skolkovo

# BIOTECHNOLOGIES MEAN PROGRESS IN HEALTH CARE AND SOCIAL MANAGEMENT

We can expect a turnaround in global medicine. While the global healthcare beneficiaries — pharmaceutical companies — were focused on the medicine for the rich, addressing such specific issues as aging, the mass market, including generic market, and technology, was let go which resulted in the disastrous spread of the pandemic in the United States.

While treating the rich was a hundred times more profitable than helping the poor and encouraging healthy lifestyle, all sorts of con artists engaged in pseudoscience flooded this market, and all the other niches were occupied by various frauds – witch doctors, sorcerers, pseudo-scientists whom people tend to trust. Today, medicine may get a real chance to take care of health problems of millions of ordinary people.

## Alexander Baurov,

Writer, columnist, former Acting Director of the Research and Analysis Center, Roscosmos State Corporation

People revolve inside the mechanism built and launched for them. There is no big difference whether they get tested for coronavirus or not, almost everything has already happened to them. Let's assume people get some chips implanted in them. People will be divided into those who can afford to avoid it because they can pay, and there will be those who will have to get those chips implanted because otherwise they will not get insurance, and there will be those who would not get those chip because they have no money for insurance anyway, so why bother? In total, I do not see any fundamental changes now, but only a continuation of trends that started before.

## Timofey Sergeytsev,

Political consultant, philosopher, representative of the methodological movement

Companies capable of finding innovative solutions to problems in the following areas can succeed:

- social management technologies – since the use of advanced biotechnologies is often in the upmarket segment and not affordable for the majority of population, social stratification based on the consumption of biotechnological products will require special management strategies and practices;
- advertising and public relations focused on overcoming fears and phobias about the development of biotechnologies and increasing tensions in society;
- ethical aspects of implementing modern biotechnologies: education and communication strategies will change dramatically.

## Mikhail Rykhtik,

Professor of the Russian Academy of Sciences, Director of the Institute of International Relations and World History of Lobachevsky State University, Nizhni Novgorod

# MEDICINE AND HEALTH CARE: SHIFT TO PREVENTIVE HEALTH CARE

In 2019, biotechnologies were already a significant force in the stock market: biotech companies accounted for a significant part of all IPOs in the United States, and NASDAQ, where they are mainly traded, outstripped NYSE, the usual leader in terms of funds raised.

**Amidst the coronavirus pandemic, equities of biotech companies fared much better than others: the NASDAQ Biotech index fell only by 10% at the peak of the crisis, and by July 17 already reached a historical record.**

**The health care market can expect major shifts, despite the fact that large biotech companies have benefited from the pandemic.**

In recent years, the health sector has been growing faster than the overall global economy: in 2000 to 2017, health spending grew by 3.9% a year, while the economy grew by 3% only. At the same time, spending grew the fastest in low income countries – by 7.8%. This means that medicine was becoming less affordable.

**Preventive medicine has become a response to this challenge, but until recently it accounted for only about 4%-6% of the market.**

One of the components of this trend was the growing market of laboratory diagnostics which gained further momentum in the pandemic due to the emergence of the large segment of testing for coronavirus and the revitalization of corporate customers.

Portable devices may find their way into the preventive medicine sooner than expected. One of the most important reasons for buying such a device will be the fast and reliable way to identify certain symptoms of a disease. The portable device market will grow rapidly in the coming years, despite the decline in the segment of smart watches due to the crisis.

# FLEXIBLE WORKSPACES

**Mikael Badalyan,**

Co-founder and CEO, Deworkacy

The period of the pandemic has had a profound impact on the commercial real estate industry. The rapid transition of organizations to a remote work format devastated office spaces, and millions of their workers were forced to accustom themselves to work from home. This large-scale experiment revealed both the disadvantages and advantages of working from the office, and many phenomena in this area, which recently seemed futuristic, began to rapidly enter the life of the entire business.

## **Office as a large meeting room**

Office space is an integral part of the development of collaborative culture. While it is possible to perform individual tasks outside the office, remote work applications have proven to be an untenable substitute for a real space where people exchange ideas and solutions. This function will be enhanced in the design of offices, and their infrastructure will be subordinated to building the correct, inspiring communicative environment.

## **Office as an access point**

When the need to optimize office costs became obvious, the issues of performance control, setting and monitoring tasks that are solved using corporate software became acute. A separate segment of these technologies will be tied to the

physical space of offices. Digital tools will be taken into account in its design, and meeting rooms, where a significant part of all activity is concentrated, will be the most technologically advanced part of the offices.

**We promote the idea that technology and gadgets allow organizing a workplace anywhere, inside and outside the office. In offices you need fewer tables, but more armchairs, mobile furniture, which you can move to create your own island. The ability to change the space for the task and mood contributes to the fact that employees begin to think outside the box: there are no boundaries in the space - there will be no restrictions on creativity.**



### Office as a brand space

Business leaders have long viewed offices as an extension of their brand. This approach will become more and more popular. The flexible workspace operators, which are becoming the choice of an increasing number of companies, offer the opportunity to make the office a tool for communication with internal and external audiences. The office becomes a public space where the brand interacts with all of its stakeholders.

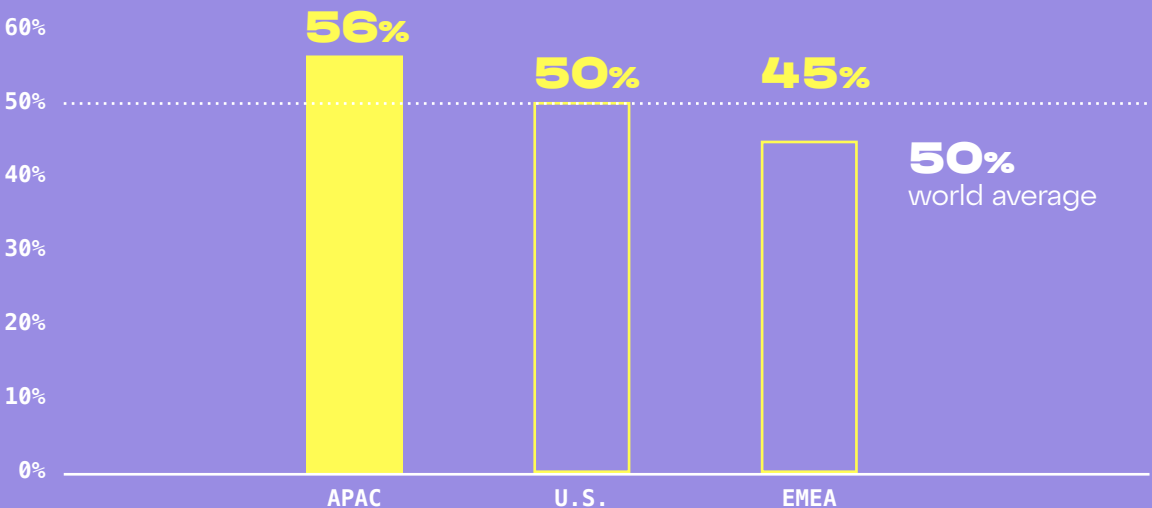
### Office as a new experience

The growing competition for talent is forcing employers to seek services that can provide the highest levels of employee satisfaction. In this case, the health factor becomes especially important. While costly elements such as full health insurance are leaving the social package, new, more effective products such as access to telemedicine services are included. This

is complemented by the introduction of a culture of a healthy lifestyle at the office level: carrying out check-ups, corporate yoga, inviting health specialists and other similar events. Another area is the acquisition of new skills through educational services tied to the company’s activities and the interests of its employees. Traditionally, this has been done by HR staff, but in those companies where they do not exist, this role is assigned to external “personal development concierges”.

Accommodation of employees cannot remain a key function of offices, and employers are looking for ways to make better use of space to better collaborate among employees, develop a brand and increase loyalty. Flexible workspaces come to the rescue, with operators covering most emerging business needs. For startups and small businesses, this means opportunities that were previously only available to large and wealthy corporations.

Only 50% of employees connected with their corporate brand and culture during lockdown



Sources: cushmanwakefield.com

# LIMITATIONS OF COMMUNICATION AS A HOTBED FOR THE SPREAD OF FAKE NEWS

Relationships between people become more clustered: people communicate in working team chats, within family, neighborhood chats etc. Even before the lockdown, a common ground of shared goals and values was vanishing; but now the 2.5month isolation experiment furthered the emergence of information clusters that have very little in common. These fake reality bubbles will hit the public life since the devaluation of scientific knowledge only gained momentum during the lockdown. In order to keep everyday comfort, people had to follow authorities' instructions, sometimes absurd and contrary to science, and such enforcement could not but be met with resistance. This includes various marginal conspiracy theories that spread in those clusters, in Whatsapp chats.

## Alexander Baurov,

Writer, columnist, former Acting Director  
of the Research and Analysis Center, Roscosmos  
State Corporation

It seems that we all realized the value of live communication offline. I realized that communication consist not only of scheduled face-to-face meetings and workshops.

In addition to routine meetings, there used to be nuances of watercooler conversations and hallway smalltalk. And, despite the various useful services, I do not see how we can do without it — as if a glue that used to keep our usual communication together dissolved. It may turn out that it was the most important element for establishing relationships with people. It is not yet clear how we will change without access to such a tool.

## Oksana Fetisova,

Head of the Corporate University, MTS

Relationships between people may become more limited. Some people may prefer not to start new relationships. This is not so difficult to imagine because over the past couple of decades people ever more drifted towards online interaction, through social media and video games, away from the real world. The perception of a relationship is changing, too, and people feel less need in physical presence in order to experience “real” emotions.

## Nelly Holmes,

Member of the Golden Globe Award Panel

# DIGITALIZATION CALLS FOR AN ANSWER — NEW VALUES FOR THE FUTURE

I expect further development of the system of civic control based on the code of ethics as a regulator of social processes. This is the way for transition from industrial civilization to a new environment in which an individual will be of highest value. Of course, there is no place for nihilism in these processes, and what we often see now — post-truth, fake news, manifestation of hate, and various types of discrimination — are sick and ugly byproducts of the formation of a whole new civilization that will be based on “human-centered” ideals.

## **Oleg Gurov,**

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

The digitalization in recent months wasn't natural. Instead of a qualitative evolution onto a new stage of social development or public-private relations, there was only an intensification of data flows, which led to digital intoxication — many are tired of zooms, digital consumption. There was no quantum leap: no new social connections inherent in the new digital society got established, no new shared digital narratives were produced, values and ideas that distinguish a mature society were not developed — I have seen no such changes.

## **Sergey Volodenkov,**

Doctor (habil.) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

The world is going to change terribly fast, but people still find it hard to give up what they're used to. There will be less need in familiar things, traditions will go away. The recognition of human values will be the driving force. I hope that over time, people would become more adaptive, we will change a lot and live in a different world full of new challenges. In the next 10 years, there will be rapid and significant changes in technologies and somewhat slower ones in politics — human rights, equality, and humanism will come to the forefront. However, such changes can take up to 30 years. Humans change slower than technologies do.

## **Ayrana Mongush,**

CEO of Mathhub, Mentors.ru

# EXISTENTIAL PROBLEMS ARE RELEVANT AGAIN

I assume that there will be more focus on self-management and learning how to meet your better half, and yourself. In a situation where the line between personal and professional is very blurred, it is important to draw the line, fill your life with things that give energy and resources. The strict lockdown at the beginning of the pandemic gave us a chance to master this skill.

## **Oksana Fetisova,**

Head of the Corporate University, MTS

One of the key problems of the 20<sup>th</sup> century was the relations between people and perception of self. Russian philosophy, the philosophy of life, and existentialism are vivid, but isolated examples of what it took the culture to resolve this problem in the context of technological development. In my opinion, now is the perfect moment for us all to show solidarity, mutual aid, and the best human qualities in order to resist the virus that can affect anyone: the poor and the rich, the young and the elderly, Europeans and Africans.

## **Oleg Gurov,**

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

The values will definitely change. For several months now, we have been living in isolation, trying to limit our personal contacts as much as possible and solve our important issues remotely. It is a serious test. While you spend more time on your own than in public, the intangible comes to the fore.

## **Seyfeddin Rustamov,**

Majority Shareholder of PJSC Metafrax

What has come to millions and millions of people in the last few months is an understanding and awareness of what they really need to be happy and healthy. Plenty random things we used on a daily basis turned out to be unnecessary. There is no longer need in business meetings, visiting restaurants, cinemas and hairdressers, doing makeup and buying clothes — many things turned out to be abundant. Many things that were embedded in people's minds are now in the past.

## **Nick Jain,**

IT entrepreneur, India, Forbes Asian 30 under 30

# GIVING UP ON CAPITALISM AND NEW AWARENESS AS A RESPONSE TO THE RESTRICTIONS

Since the beginning of the COVID-19 pandemic, governments have been forced to make decisions that significantly restrict the rights and freedoms of their citizens. Depending on the measures taken, we can also observe different social phenomena. Existing problems caused by economic inequality and the lack of necessary medical infrastructure are becoming more acute, and there is public frustration with leaders and organisations that are unable to protect their societies and make balanced decisions. At the same time, we have seen examples of solidarity within society, which has manifested itself in the spontaneous growth of volunteer movements aimed at helping those in need during this crisis situation. This shows a high level of responsibility among the younger generation, who recognise the role and importance of public initiatives.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University,  
Doctor (habilitation) of Political Studies

It is the fact of life that the coronavirus has become the Great Equalizer. I was one of the “canaries in the coalmine of all things Covid19”. Now we are at the place where there is no guarantee of the immunity for anyone and we are right in the middle of this. I understand my blessings and where I can help out. You write some checks to food banks and everything else to live up to your altruistic responsibilities and not only you do take part in the collective effort, you also do your part individually.

## **Tom Hanks,**

Actor

In the coming years, values will be reassessed, and gradually, the values of the capitalist world associated with scope and quality of consumption determined by brands, will be given up. New values will emerge to which new groups with their own ethics would gravitate. Competition for consumption will be replaced with competition in other domains and dimensions.

Eventually, such closeknit communities should lead to a decrease in consumption for the sake of consumption, to a decrease in environmental impact on the planet.

## **Grigor Badalyan,**

Co-founder, Strategy Director, Stellar communications agency

# WHAT WILL THE FUTURE LEADERS NEED?





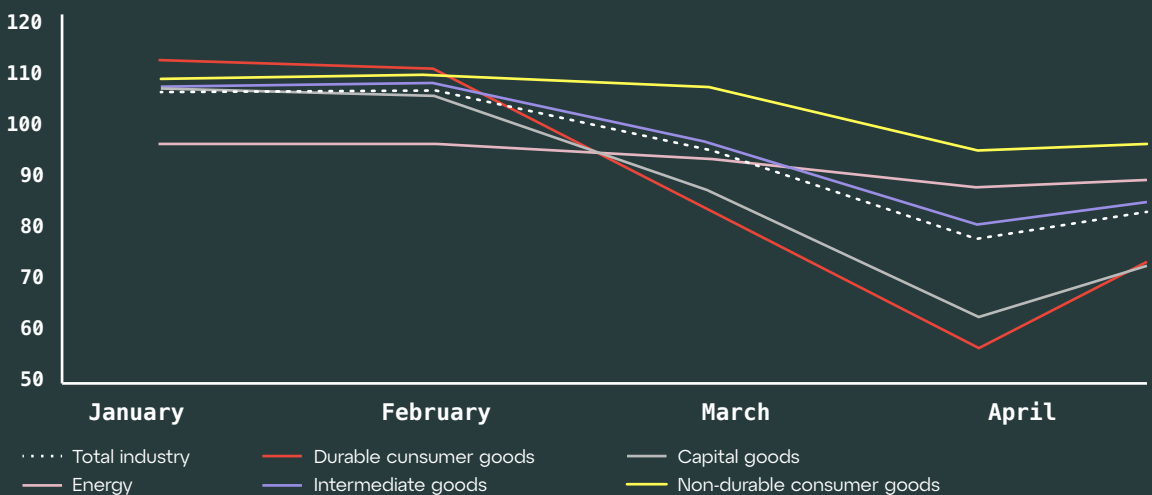
# SUSPENSION OF PRODUCTION AND TOURISM MADE THE ENVIRONMENT CLEANER

During the lockdown, across the world, a significant decrease in manufacturing was registered. For example, in April 2020, in the European Union, consumer durable goods production decreased by 31%. EU product output in total fell down to the 1990s level.

**Because of the reduced air pollution, residents of some provinces in North India for the first time in 30 years were able to see the Himalaya in some 200 km distance.**

At the same time, global air traffic shrank by 60%. These two factors resulted in significantly lower levels of air pollution.

Development of manufacturing



Sources: unctad.org; ec.europa.eu; theguardian.com; sbs.com.au

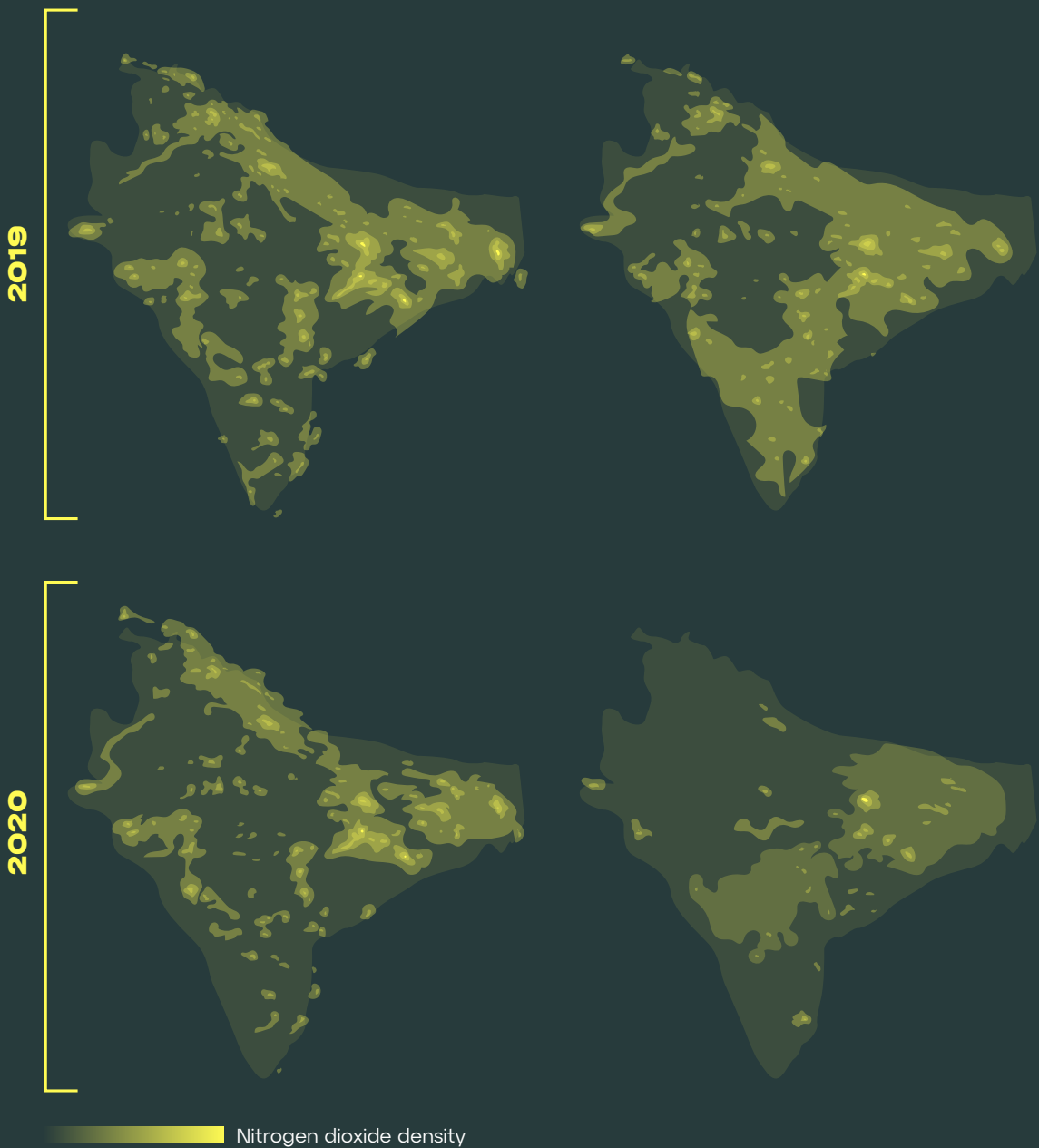


# AS A RESULT OF THE PANDEMIC, THE SKIES IN INDIA BECAME CLEARER

The level of nitrogen dioxide in the lower atmosphere

January 1 – March 24

March 25 – April 20



# EXODUS FROM CITIES AS A PROTEST AGAINST CAPITALISM AND A NEW ENDEAVOR FOR THE MANKIND

In the near future, we will experience the collapse of capitalism. It will be either spontaneous, rapid, and chaotic, or gradual and smooth so that we would not even know when the paradigm shift occurs. We will definitely move towards technocracy. There will be new means of transport; we will feel closer in terms of ideas, but much apart in physical terms. People will long for individuality, for a life away from densely populated cities that no longer make sense.

**David Hernand Bintsene,**

Film director, founder of the POST TRIBE Agency

The key discovery that the humankind made over the past few months is that at least some of us are able to do our jobs out of office. This will have much more significant consequences than it may seem. For example, even today we can imagine small towns near Sochi or in the Crimea, with crowds of programmers working for different companies and creating new communities of the kin. In the wake of the current crisis, people at last will be able to make their dream come true: to live in one place and to work in a quite different one.

**Grigory Bakunov,**

Director of Technology Distribution, Yandex

When it comes to people's lifestyle, there will be much more remote formats both in education and in business. De-urbanization is one of the potential trends. It may result in formation of local communities that may choose to minimize digital noise. People will become more open and aware of the opportunities of joint effort and its benefits. If one community is open while the other is not, in the end both would lose.

**Vladimir Golubyatnikov,**

Group Head of Investment Planning, Eurasian Resources Group

From the perspective of future development the coronacrisis became a great business driver and a prerequisite for implementing advanced technology. In the future we all will become more careful, will mind the bankroll, fill up reserve funds and put down the appetite for risks.

**Roman Zaripov,**

Founder of OUT DIGITAL Agency

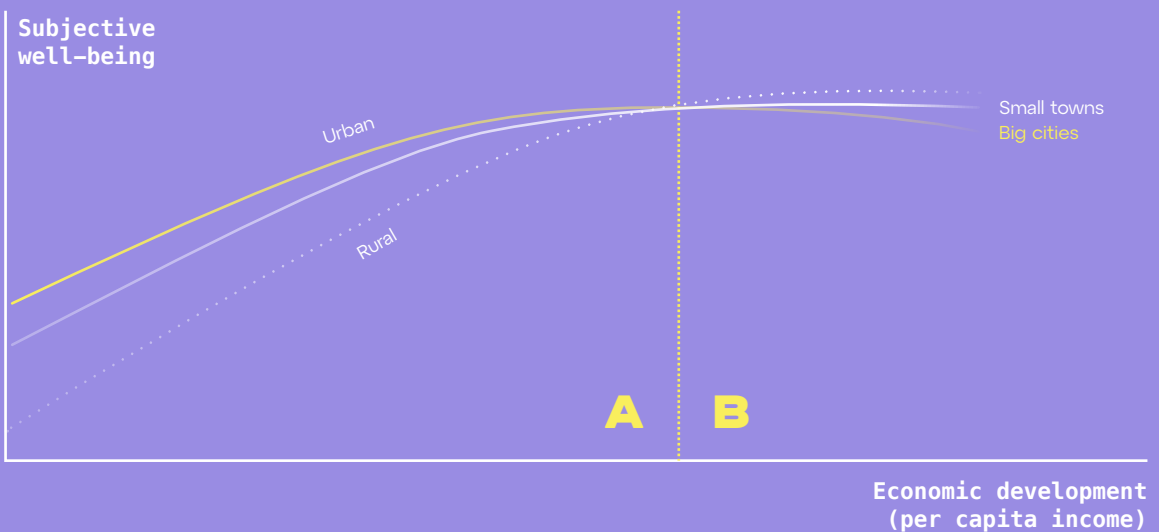
# GOING BEYOND CITIES MAY GIVE A GREATER SENSE OF HAPPINESS

**Quite unexpectedly, among the markets that were positively affected by the lockdown is the market of suburban and rural real estate.**

In Scotland, local residents witnessed rising prices for houses in rural areas due to the influx of buyers from England, and in the United States, interest in countryside houses has spiked at real estate websites.

The lockdown period may fundamentally change people's approach to choosing residence. Earlier, researchers noticed that residents in well-off regions feel better in rural areas than in metropolitan ones. The experience of prolonged isolation at home made the advantages of this lifestyle more evident especially for people in advanced countries and prosperous agglomerations who can afford to buy a second home or to move without losing income.

## Urban paradox: subjective well-being vs big city



Sources: telegraph.co.uk; redfin.com; worldhappiness.report

# THE DEMAND FOR NEW LIVING STANDARDS DETERMINES CHANGES IN THE GLOBAL ECONOMY

Remote education and work, e-commerce with good logistics as positive factors on one hand, and the limitations of life in a metropolitan city that became so obvious during the lockdown, on the other hand, will shift the focus from big cities to small settlements.

In addition to such obvious advantages as larger living space, natural environment, peace of mind and better health, wholesome food from local producers, such small settlements might be founded on the principle of professional affinity: shared economy and cooperation of people who share common views, interests, and are on the same wavelength (the Soviet era “science cities” and “academic towns” are probably some sort of a precedent of the concept). The role of an individual and that of small communities will be growing.

## **Grigor Badalyan,**

Co-founder, Strategy Director, Stellar communications agency

This whole matter of remote work will greatly affect the distribution of payroll and business in the IT sphere. If we accept the idea that a fairly large part of the humankind can work remotely it means that you don't have to pay someone to make them move to California and you don't have to pay them the California standard money, but, for example, the Syktyvkar standard instead, or even five times less. This will further encourage people to move from where they used to live to other places. At the same time, there should be a sharp slump in the level of compensation, because the competition would be getting hotter: one will have to compete not only with those who live nearby in California, or those who are ready to move there, but, in fact, with the whole world. This is quite a positive trend for the humankind as a whole, because increased competition usually translates to better overall quality.

## **Grigory Bakunov,**

Director of Technology Distribution, Yandex

People learn to appreciate the living away from city centers, which, coupled with remote working, will certainly affect the real estate market, both residential and commercial. Domestic tourism is another big trend. Soon, people will feel the advantages of domestic tourism, and operators will get a powerful impetus this year.

## **Yaroslav Shuvaev,**

Chief Internal Innovations Officer, AK BARS

# TOURISM: PEOPLE GET MORE INTERESTED IN DOMESTIC RESORTS

Tourism suffered significantly from the crisis. Last year, the sector earned \$ 9 trillion or 10% of global GDP. According to recent estimates, in 2020, the slowdown in tourism is expected to be 60% or even 80% if the recovery takes until December. Thus, up to 120 million jobs may be at risk.

The drop in tourism revenues urged some countries to reset their priorities.

So, Thailand decided to give up on low-budget tourism and to focus on the premium segment. In the 2020–2021 season, preference will be given to guests of 4- and 5star hotels. The reason for this is the environment improvement during the lockdown when animals reappeared on abandoned beaches which made the negative impact of budget tourism on the environment so obvious.

Brian Chesky, Founder of Airbnb that suffered from the crisis on a par with other tourism services, expressed the opinion that travel and tourism

industries will be changed forever by the coronavirus pandemic, people will travel less to major tourist cities and will instead choose to visit less wellknown destinations that are closer to their places of residence and do not require cross border flights.

**Domestic tourism will be the first to recover from the crisis: in July already, most countries saw an increase in bookings at domestic resorts.**

Although, in the short term, it may be a poor compensation, those countries that grab the opportunity to diversify their product range will create a multiplier effect for their economies and, above all, for tourism-related creative sectors — from IT to music and theater.

# WE ARE APPROACHING A MULTIPOLAR SYSTEM OF INTERNATIONAL TRADE

The structure of global trade will fall apart into blocks. The WTO system that existed in the late 1990s and early 2000s does not exist anymore. The idea of trade partnerships promoted by Obama was a good plan to counter America's losing control over the global trade; however, it was abandoned. The United States maintain their position having a huge cushion, but each of the pillars of America's power is crumbling.

Over the past year and a half, the United States have emitted several trillion dollars and almost all bonds were called by Federal Loan Banks which makes them pure domestic loans. The global power that George Bush Jr. used to govern, and the US today are two different countries. Then, their global influence was undoubted, now everyone is waiting for it to end.

## Alexander Baurov,

Writer, columnist, former Acting Director, Research and Analytical Center, Roscosmos State Corporation

China comes to the fore; India is in the second position, while the United States and Singapore come third. China does not recognize the dollar and vigorously develops own industries and domestic consumption. They developed an excellent mechanism for domestic support, subsidies, and encourage initiatives.

In India, half the population has no access to electricity, but the country shows the highest economic results and growth rates. The domestic market and the number of residents will definitely play a key role. The United States are going through hard times: political and ideological crises are the impeding factors. Singapore may become one of the leading countries in terms of business support, large number of funds and well-built infrastructure.

## Andrey Kupreyev,

World and European champion in Jujutsu, owner of the GYMNASIUM chain of sport clubs and gyms

Colossal demand for internal production within countries will emerge and international cooperation will evolve as a part of certain unions and associations with trustful and beneficial ties among participants. Countries that have already put effort into GDP growth, increasing labour efficiency, implementing advanced technological and management technologies will become the leaders in the nearest future.

## Andrey Golovanov,

Head of the Department for Development of the Centre of Expertise for Major Construction Projects (CEMCP), Rosatom

# EMERGENCE OF NEW LEADERS — THE RISE OF ASIA'S COMMUNITY SPIRIT

In the coming years, we will see the role of the US go weaker. The crisis of the global dollar-based system, the devaluation of the dollar against major currencies. China's rise to the leading position. The question is whether China will be able to independently (or in cooperation) boost technological innovations, thus reducing dependence on the technologies developed by American TNCs.

## **Grigor Badalyan,**

Co-founder, Strategy Director, Stellar communications agency

Today, we witness a global redistribution in the balance of power. This trend began long ago, and China is obviously taking the lead. The coronavirus crisis will not affect this trend, it will rather accelerate it. We are witnessing a massive crisis unfolding in the United States — both political and social, economic and ideological. In this context, China will confidently take the leading position — it seems to me that within 10 years China's economy will be significantly stronger than the US economy. In many ways, it is a matter of mindset: the current crisis has shown that the Chinese are more willing to sacrifice their personal interests for the common good. They are more diligent and inclined to community spirit.

## **Vladimir Golubyatnikov,**

Group Head of Investment Planning, Eurasian Resources Group

In 10 years, the geopolitical situation will change. The United States will cease to exist as they are now. China is already in the first place due to its huge population and flexible principles. Europe will lose its identity and position on the global stage. Perhaps, countries like Indonesia will take higher ground. There will be two vectors of confrontation — technological and religious.

## **Evgeny Volkov,**

General Director of AITU DALA video hosting

Speaking of the United States, I see the following scenarios: either they will completely collapse to the worst state of post-Imperial Great Britain (the United States will remain one of the leading countries, but will lose their influence). Like Rome in the period of fall. Or the US will use the crisis and go through a civil war in a soft way, with urban technocrats defeating obsolete manufacturers. China is already at the stage of exponential growth, which is very difficult to counter. But there are internal and external factors that can stop this trend. Europe will be a balancing mediator, but not leader of global processes.

## **Nadia Zheksembayeva,**

Founder of Reinvention Academy, scientist, speaker and author, Reinvention Academy

# THE NEXT FEW YEARS WILL SEE CONFRONTATION ALONG NEW BORDERS OF INFLUENCE

The crisis situation affected the international trade, but the current state is based on the strategic conditions rooted in the past. As exemplified by the United States, Great Britain, and Japan, we can observe a radical change of position, refocusing on domestic development. At the same time, we can see a robust economic growth in Asia, Africa, and Latin America which significantly modify the architecture of global development, transport logistics and value chains.

Existing international financial and political institutions do not fully reflect the new realities. As a result, we can see increasing tension between the global North and South, West and East, and the emergence of conditions for trade wars.

## Vladimir Yakunin,

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habilitation) of Political Studies

We are in for destruction of the alliances created over the past 50–60 years, as no one trusts anyone anymore. Within each alliance, the strong got even stronger, and the weak got weaker. The US and China still will be leaders, just more aggressive and dynamic. The US will continue to move forward by inertia, while China notwithstanding any restrictions, is already “a locomotive picking up steam.”

## Alexander Nenashev,

Head of the public relations bureau, lecturer with the British Higher School of Art and Design and Skolkovo

Let's take just the US foreign borrowings, they are already very large. However, there is no clear logic as to how, why, and to whom it could be repaid. Trade means transaction, but when you get a bond, it is not trade; some different definition is needed here. And then this bond is given over to someone else, that is, the transaction was not closed, so it is still not closed and it is unclear when it will be closed. This is not so much a trade as an extortion.

The fact is that those whose funds have been extorted have more or less got up off their knees and do not agree any longer on the extortion. This applies to us, China, India, and others... Even in Latin America they no longer agree on the extortion from them, they remember other times when things were much better...

## Timofey Sergeytsev,

Political consultant, philosopher, representative of the methodological movement

The world is facing an era of protectionism and trade wars. China's influence will significantly increase, while the US, on the contrary, will lose its dominance due to internal political conflicts. Conflicts will get stronger in Europe between France, Germany and Great Britain. A global political and military crisis is coming, as the contradictions between the US, Russia, China, and the European Union grow.

## Dmitry Poyarkov,

Deputy Head of CSR and Brand Management, Severstal



# ENERGY MARKET: LACK OF SOLIDARITY LEADS TO TURBULENCE

The oil crisis was a shocking curtain raiser for the coronavirus crisis: anticipating a pandemic and a new potential global financial crisis, the largest players — OPEC members, Russia and the United States — took up a struggle for segments of the shrinking market. The price war resulted in a demand shock, which in its turn drove oil and gas prices to negative values where they remained for some time.

Over the past 15 years, oil companies' stock was growing moderately compared to the S&P 500 values. Producers focused on increasing oil production and storage volumes, which held back the growth of oil prices and dividends which in 2005–2019 grew by mere 2%.

**Today, the industry is entering an era of harsh competition that will take a lot more of effort in innovations; however, oil and gas will remain a multi-trillion dollar market for a long time to come.**

The pandemic and lower oil prices affected investments in renewable energy which are expected to fall by 10% in 2020. At the same time, the devastating impact of the oil shock on global markets drew the world's attention to the challenges of energy transition.

In the context of diminishing incentives for switching to green energy and slump in manufacturing, government support for renewable energy within the economy recovery measures is becoming a key factor.

The 2020 crisis will wash out medium-sized players from the energy market which eventually will leave only large natural monopolies and small innovative companies.

Major players will try to grab the opportunity to become beneficiaries of the energy transition. For example, Russia's Gazprom and Rosatom have already announced ambitious plans to export hydrogen.

# NEW CENTRES OF POWER — HOW WILL THEY USE THEIR INFLUENCE?

The world becomes more and more decentralized. Earlier, there was globalization, which was actually Americanization, when the whole world tried to take after one particular country and partner with it; nowadays, we are heading in the opposite direction. Now, the character of global competition is shifting from a few giant and strong global players to large number of small international players instead. The most interesting thing now is where the new centers of power will emerge? I believe there will be three or four of them, not two, as it used to be in the 1960–1970s. The US will retain its influence, China will be super-strong, and a couple of countries that are significant not only as sales markets (like India), and which will loom over the horizon and annoy these two strongest leaders... quite an exciting time.

**Grigory Bakunov,**

Director of Technology Distribution, Yandex

I think when we all go through a common experience, we get to understand our neighbors better. On the other hand, local communities, food, culture, and pride in one's home place have been eradicated across much of the United States, while corporations are eradicating local businesses. This is unhealthy, unfair, and just plain wrong. Cultural purge expanded on other countries, and we have witnessed communities around the world gradually being deprived of their culture. It is a modern time cultural genocide. This is why I speak of the future as one world with a global mindset and at the same time with pride in one's community: food, culture, and lifestyle should be preserved.

**Nelly Holmes,**

Member of the Golden Globe Award Panel

Now we are on the verge of a political crisis. Division into countries will be left in the past. People will be living in the space of corporations which will start taking over functions of the state.

**David Hernand Bintsene,**

Film director, founder of the POST TRIBE Agency

# CHANGING ROLE OF CORPORATIONS CALLS FOR A REVIEW OF THEIR MANAGEMENT MODEL

Corporations looked at themselves and realized that trust and communication are critical in the vertical shaped around owners or management. Each lower level manager acts as an aid for the higher level manager, and it is extremely important that this structure is not eroded. This connectivity is very important for decision making, it cannot be disrupted by anything, even a lockdown. A new goal will be to digitize and visualize this communication. The target is a total presence, confidential communication: even in “private mode”, it is not always clear whether an employee heard you and what conclusions they made. Distance remains a problem, and Zoom is not a solution.

## Alexander Baurov,

Writer, columnist, former Acting Director of the Research and Analytical Center, Roscosmos State Corporation

My takeaway from the current crisis situation:

- there is no need in too much staff if a small part of it is able to do the job efficiently;
- it is important to develop online formats — in the event of a similar crisis, it would allow you to minimize losses;
- expenses must be reviewed;
- it is important to review relationships with people and relationships within the corporation.

## Andrey Kupreyev,

World and European champion in Jujutsu, owner of the GYMNASIUM chain of sport clubs and gyms

Although for many years it was believed that the most exciting things happened in startups while corporations, being more rigid, did not produce innovations; now, the transition from quantity to quality took place. Large companies, having accumulated a large number of valuable specialists, come out of the crisis more easily and recruit even more people who float out of startups due to the crisis. Therefore, large companies will be growing most dynamically. Many of them have learned to act faster than before, in large part, thanks to the crisis. It will be the decade of corporations.

## Grigory Bakunov,

Director of Technology Distribution, Yandex

# CORPORATIONS' INFLUENCE IS BASED ON DATA AND SECURITY

Amazon announced setting up of its own largest medical center to test its employees for coronavirus. Apple and Google recently made news when they announced joining forces to help the world control the pandemic. These companies' software is installed in 90% of all smartphones across the globe, therefore, these companies will be able to fully track the virus spread through exchanging data of users' spatial movements. Soon it will be easy to identify almost any person's contacts and their location. Today, in the context of the pandemic there is a situation described by futurologists: people have to choose between privacy and safety, and almost everyone opts for the latter.

**Grigory Mastrider,**  
blogger

Assuming the coronavirus goes away, of course, we'd get off with nothing more than a fright, but at the same time, there is no doubt that certain developments made over the past three months in the digital sphere will be used in both social and political spheres.

Political control: Google and Apple integrate technologies into operating systems to control the virus spread through tracking contacts of individual mobile users. Of course, these developments will also be used in postpandemic conditions.

**Sergey Volodenkov,**  
Doctor (habil.) of Political Science, Professor  
of the Moscow State University, Managing Partner  
of G3 Communication Group

From the regulatory perspective in Russia and overall growing isolationism in the world as well we have to take into account the politics of import substitution that is eagerly supported by the government. The priority will be granted to helping internal business and manufacturing, while cross-border goods will be increasingly charged.

**Oleg Malyshev,**  
Head of Strategy, Russian Post

# THE IT INDUSTRY IS BECOMING THE STANDARD-BEARER OF THE ERA

IT companies remain all important. People more than ever want to do things without leaving home or getting up from couch. Using IT products, people tend to reduce interactions and contacts with other people, which is their key function. Hence, amidst the pandemic, IT will continue to perform their function, becoming more accessible throughout the world.

## **Nick Jain,**

IT entrepreneur, India, Forbes Asian 30 under 30

The industries that will develop faster are those that provide people with technical tools for communication on a new level.

## **Alexander Baurov,**

Writer, columnist, former Acting Director of the Research and Analytical Center, Roscosmos State Corporation

Undoubtedly, IT industry will provide the future business leaders. Those who are capable of creating new products and services and satisfy the demand for digitalization will lead the way.

## **Andrey Golovanov,**

Head of the Department for Development of the Centre of Expertise for Major Construction Projects (CEMCP), Rosatom

Those who succeeded in grabbing this opportunity gained a significant advantage. For example, Zoom — a relatively small company in terms of capitalization — in early June outstripped AMD that produces processors, hardware, and so on. Large companies that are encumbered with offline infrastructure, in terms of capitalization found themselves losing to those who initially focused or refocused on digital interaction, sales of digital services, content, and so on.

Therefore, I believe that capitalization of companies that are engaged in the digital industry will grow regardless of the pandemic.

## **Sergey Volodenkov,**

Doctor (habil.) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

# TECHNOLOGIES, MEDIA AND TELECOM: INTEGRATION BREEDS NEW LEADERS

Technology, media and telecom were among the industries least affected by the pandemic: amidst the lockdown, these companies showed a much better result than the S&P 500.

At the same time, within the sector, the degree of the crisis's impact varied significantly. As expected, the fault line runs between the offline and online domains.

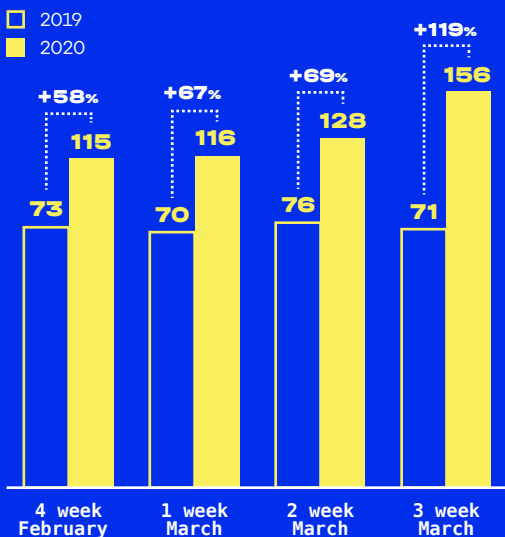
In the advertising sector, sensitive to market fluctuations, the shrinkage of budgets led to reallocation of funds in favor of digital channels.

In the media sector, all offline links in the production chain were impacted as well. The suspension of sports events pushed media consumers to give up television in favor of streaming much faster, while interrupted film productions brought online cinemas with rich content archives to a winning position.

While Internet services and infrastructure gained the most in the situation, the FAANG companies (Facebook, Amazon, Apple, Netflix, Google) hardly felt its negative impact, either — their net worth dropped by a mere 3%.

For several years now, the sphere of technologies, media, and telecom have been driven by the trend towards convergence that erases boundaries between content creation, delivery, and promotion. Amidst the pandemic, when some companies lost significantly more in net worth than others, it is likely that the number of mergers and acquisitions will grow, with the focus on intellectual property rights and brands.

Total number of streaming minutes, billion, viewers 2+, 2019-2020



Sources: kpmg.us

# BUSINESS PROCESSES ASSOCIATED WITH PHYSICAL REALITY ARE LOSING THEIR VALUE

Globally, IT industry was best prepared for the current situation. The only thing that IT companies lost in their business was everything associated with offline processes. Over the past few years, mankind has been developing IT services at the cross-section of online and offline domains. For example, a ride-hailing application, amidst the lockdown found that no driver was needed, and that was a big problem.

## **Grigory Bakunov,**

Director of Technology Distribution, Yandex

Labour jobs will be more digitalized. Definitely, people cannot afford being dependent on couriers and plumbers to such an extent. There will be new digital tools for remote work: from conferences to equipment setups, for example, when experts are not physically on site.

## **Dmitry Poyarkov,**

Deputy Head of CSR and Brand Management, Severstal

The era of routine cognitive work is ending, and, consequently, the development of digital products will no longer bring as much profit and value as it used to when Microsoft was founded. The next step is to automate non-routine cognitive and manual processes. We will see a lot of unicorns in robotics and artificial intelligence. Private space missions will begin to develop faster and more vigorously. Biotechnology and quantum computing will be growing exponentially. In the near future, the world will change even more, and speed will only increase. It's time for all of us to accept it and to start prepare ourselves right now!

## **Yaroslav Shuvaev,**

Chief Internal Innovations Officer, AK BARS

# LOGISTICS: SUPPLY CHAIN PARTICIPANTS GET MORE INTEGRATED

We see a growing demand for services via digital channels. For example, customers want to totally track their parcel shipment progress, receive notifications on their phone when it is delivered to a pickup point, immediately select delivery time and book a courier. During the crisis, the demand for home delivery increased by 15 times.

From a global perspective, in the coming decade, online marketplaces will get saturated. These are the platforms where a large number of vendors come to sell their products, while the platform provides services and support such as billing, logistics, fulfillment, processing and storage of goods.

## **Oleg Malyshev,**

Head of Strategy, Russian Post

Presumably, automatic systems of smart logistics and digital industry have every chance for accelerated development in the context of international trade that is getting ever more complex.

## **Vadim Chekletsov,**

Executive Director of the Russian IoT center, Research Associate with the South-West State University

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The lockdown came as a shock for international logistics and warehousing. Disruptions in supply chains and spiking demand for online retail showed how important this sphere is and how vulnerable the global trade system is.

In China, within the period from January 24 to February 26, motor freight transportation which accounts for 80% of the entire domestic freight dropped down to the level of 15% against 2019, which made obvious the other economies' critical dependence on the sector.

The coronavirus is likely to change the existing supply chains — they will become simpler and shorter; large businesses will seek to reduce their dependence on one single country of origin.

At the same time, technology solutions for logistics, such as warehouse robots and autonomous vehicles, as well as Internet of things that ensures compliance with sanitary standards in warehouses, will become allimportant.



# CAR INDUSTRY: MANUFACTURERS JOIN EFFORTS TO TACKLE NEW CHALLENGES

European car manufacturing sector is an example of the coronavirus impact. To date, more jobs got shed there than in 2008, although the financial crisis is still only looming. Massive layoffs were registered in France, Germany, and Spain. Car manufacturers realized that there will be no demand for cars in the coming years because people will not have money to buy them.

## Alexander Baurov,

Writer, columnist, former Acting Director of the Research and Analytical Center, Roscosmos State Corporation

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The car manufacturing industry has been cutting production and laying off personnel for years.

On the one hand, it reflects Millennials' skeptical attitude towards car ownership, on the other, the growing demand for electric vehicles that are made of half the number of parts. In Germany, in April 2020, one of the reports showed that up to one half of 814,000 jobs in the industry may be cut by 2030.

Amidst the pandemic, 2020 car sales around the world will be about 22% short of the target: about 70 million cars will be sold instead of 90 million. In the US, the drop will be the whole 26.6%: 12.5 million instead of 17 million.

In this context, manufacturers were forced to take unpopular measures: for example, Renault (France) announced its intention to cut 15,000 jobs worldwide, while Nissan (Japan) intends to lay off 2,800 people in Barcelona.

In order to address the challenges and impacts of the pandemic, the automotive industry will have to undergo significant changes. Among those will be active consolidation of manufacturers and introduction of new business models including subscriptions and shared consumption, robust expansion of content for the development of autonomous vehicle ecosystem into production and distribution.

# URBAN MOBILITY ECOSYSTEM

**Vitaly Bedarev,**

Executive director, Citymobil

Urban mobility is developing according to a similar scenario everywhere. The trends in this area are clear and, most likely, Russia will follow them as well. There are several such trends:

## **Decline of personal transport**

In the next 10-20 years, the use of personal vehicles will become an exception rather than a rule. In a pandemic, this trend has somewhat slowed down, but within 5 years the pace of its development will return to the previous level.

## **Multimodality**

A person needs not the transport itself, but getting from point A to point B in the fastest, cheapest and most comfortable way. This idea is implemented within the framework of the MaaS, Mobility-as-a-Service model. MaaS implies a comprehensive solution to all travel issues, within which the user receives the best routes based on his plans and preferences.

## **Mobility super-apps**

These applications allow you to navigate to your destination using all possible means of transport. Access to different modalities and their payment are seamlessly integrated in such a way that a person only has to choose the most suitable route. It is unlikely that we will see ubiquitous distribution

of applications where mobility is combined with other services, but in Asia, such options have already achieved distribution.

## **Autonomous transport**

Autonomous transport will attract more and more attention, but the timing of its appearance on city streets is greatly exaggerated. Autonomous rail transport and harvesters operating where there is no heavy traffic is a matter of several years. The next stage will be cargo transportation, and here we already see good examples. Now they work in such a way that a truck drives autonomously along the highway, and a person drives it in the city. To make it completely autonomous, you will need specially designated lanes on the roads.

Passenger transportation is more complicated in legal regulation, and from the technological point of view, the readiness for it is also far from what entrepreneurs in this area like to tell investors. In general, in 100 years all cars will be autonomous, but the initial expectation that everyone will use them in 2025 will definitely not come true.

**We at Citymobil have already added scooters to our application. This is not a complete implementation of MaaS yet, but the ability to select a modality in one**

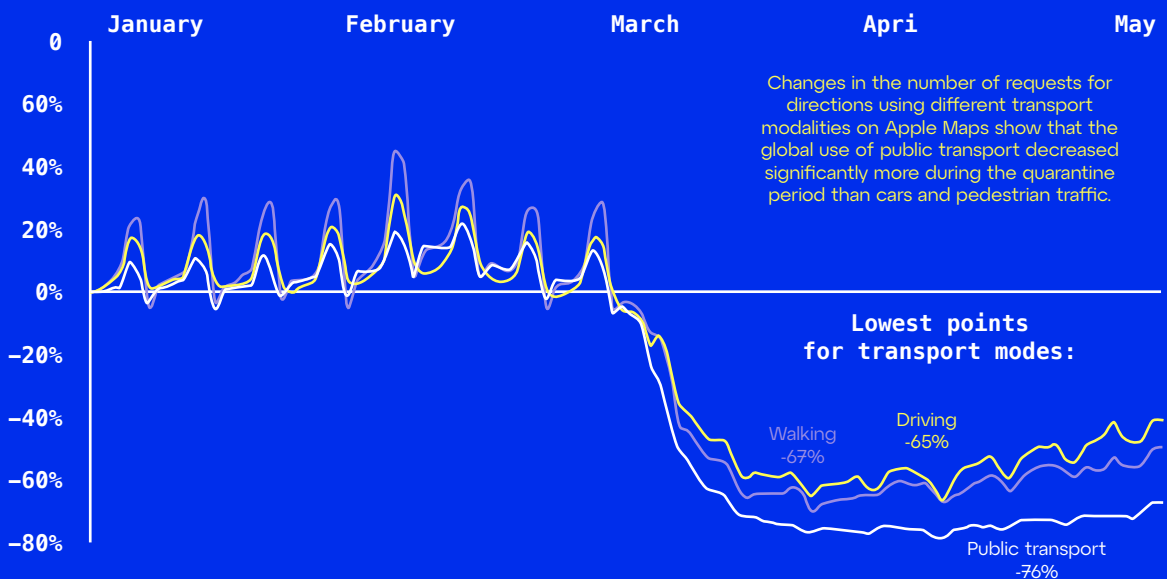
**application. Next year, we plan to develop interaction with other modalities, so that users can create combined routes.**

In general, the urban transport system will increasingly cooperate with major MaaS platforms. Perhaps somewhere we will even see how the latter partially privatize public transport. In China, however, they are moving towards embedding urban mobility platforms in the work of road services. For example, Didi has deployed its AI-powered traffic management system in 20 of the country's largest cities, which has significantly optimized urban traffic.

The epidemic has strongly impacted trends in urban mobility. People have started to avoid public transport, so they will use their car, taxi and carsharing more often.

An important trend is that the business has reorganized itself to work remotely, and some of the staff will no longer return to the office. Against this background, the demand for public transport is declining, but interest in micromobility services is growing, as has already happened in the United States. Demand for the delivery of everything that is possible will also grow, as well as for new models of logistics.

#### Requests for transport modes



# WHICH COMPANIES WILL BE ABLE TO STAY AFLOAT AND DEVELOP FASTER THAN OTHERS IN THIS DECADE?



Amazon



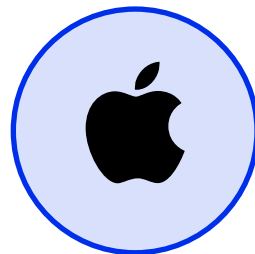
Google



Yan



Tesla



Apple



Spa



Facebook



Stripe



Tak



Sberbank



Rosneft



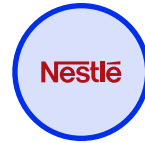
Alibaba



HashiCorp



GitLab



Nestlé



dex



Microsoft



Arrival



Baidu



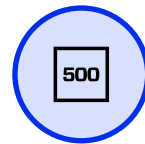
ceX



Netflix



GlaxoSmithKline



500 Startups



ce2



EpicGames



MOMO dating



Danone

# ESCAPE FROM THE PERILS OF SELF-DEVELOPMENT AND CREATIVITY

To remain employable in the future, today one has to pump up soft skills. This is the only thing — if it's highlevel soft skills — where we have a fundamental advantage compared to artificial intelligence, and the only thing that AI will not be able to master well enough in the near future. Command of programming languages will become obsolete, and after some time, artificial intelligence will be able to perform programming operations.

Other applied hard skills, such as law, accounting, and finance, will also become obsolete. Almost everything can be automated but for some skills inherent to humans only: ability to please, persuasiveness, salesmanship, and influencing people's opinions. Soft skills, communication skills, creativity — these are the skills I would advise everyone to master today.

## **Grigory Mastrider,**

Blogger

One has to learn how to switch between different areas of knowledge, master them quickly, and most importantly, synthesize and build a comprehensive vision of problems.

It is also an absolute must to develop emotional intelligence, explore own emotions, emotions of others, gain better control over self, own fate and current situation.

## **Grigor Badalyan,**

Co-founder, Strategy Director, Stellar communications agency

Read, think, travel, talk to many different interesting people. Go beyond your “social bubble” and explore the world.

## **Nelly Holmes,**

Member of the Golden Globe Award Panel

Curiously, the live concerts industry has suffered but the industry of live streaming hasn't surged. We still lack such quality light, sound and assembling equipment to make an online event that could indeed replace a live concert. We need some disruptive system or technology so that online could compete on par with offline. For the time being online can only be a great boost for the offline events.

## **Roman Varnin,**

Musician, producer, director, member of the Malbec band, founder of the MLBC label

# COMMUNICATION AND INFORMATION MANAGEMENT SKILLS ARE MORE SOUGHT AFTER THAN EVER

One has to develop communication skills and be ready to distinguish fake things from the real ones, stick to the world view that is real, read a lot, analyze information and communicate a lot. It is also important to get to know and understand Chinese culture. We already understand the Americans well; we imbibed this knowledge through popular culture. Now we all need to start studying China, discover “their world” and try and sell them emotional, design, and intellectual solutions instead of mineral resources.

## Alexander Baurov,

Writer, columnist, former Acting Director of the Research and Analytical Center, Roscosmos State Corporation

It is a must to master information technologies, technology savvy methods of communication; it will help process information faster, more accurately and in-depth.

For example, high technologies help automate processing of information of production facilities with less effort and in shorter time. This contributes to more efficient business management.

## Seyfeddin Rustamov,

Majority Shareholder of PJSC Metafrax

One must know how to work with large amounts of information, be able to structure it, distinguish truth from fiction, work under information overload, balance between the physical and digital spaces, traditional and analog values, narratives, and ideas on which individuals and society base. The fact is that all things digital are not inherent in humans, it is not a stage in human evolution but a stage in technology evolution, and humans as such don't have it in themselves. Therefore, if a person has learned to remain “analog” and efficiently function in a digital environment, it is a really useful skill that helps exist in the digital environment and still remain a live person instead of a gadget extension.

## Sergey Volodenkov,

Doctor (habil.) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

# NOWADAYS, SUCCESS TAKES SPECIAL FLEXIBILITY IN SKILLS AND ATTITUDES

The speed of global development has changed our understanding of education, which has now become an integral part of all of our lives. Regardless of age or field of interest, a person needs to continue to gain new knowledge, to be able to find the necessary information and to learn to use rapidly developing technologies. At the same time, it is important to develop one's knowledge in human psychology and human relations, in history and culture, and to have empathy for others. People remain people – we communicate, live and work with each other – which means that this knowledge and these cognitive abilities allow us to effectively build relationships. Moreover, these skills will remain in demand in the political, economic and social spheres.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University,  
Doctor (habilitation) of Political Studies

I believe that the requirements for employees in all spheres will only get higher, so any training and education won't hurt. I think that, in general, now it is important to develop analytical skills, since one often has to research and draw conclusions based on large amounts of information. In addition, I attach great importance to communication skills: the world is becoming cross-disciplinary, and fruitful communication between theorists and doers, physicists and poets, technocrats and humanists, officials and activists is an urgent need.

## **Oleg Gurov,**

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

The most valuable feature in the future world will be willingness to be flexible, to develop agility in decision making, willingness to constantly improve yourself and things you're engaged in.

One needs to be prepared for the fact that one day they are CEO of an IT company, and next day – a foreman of janitors, but janitors are also important, if the world needs janitors — janitors have to be managed. The only thing to do is to constantly develop.

## **Grigory Bakunov,**

Director of Technology Distribution, Yandex



# THERE WILL BE CHANGES IN EDUCATION, BUT THEIR RESULT IS STILL DIFFICULT TO EVALUATE

In recent months, we have taken part in an experiment to maximise the transfer of educational and scientific activities to a virtual format. Undoubtedly, this move has a number of advantages in relation to optimising time, organisational and financial resources. However, the use of exclusively digital communication is questionable in the long term: face-to-face communication forms deeper connections between people, provides a more effective transfer of information and knowledge, and helps the development of lateral connections between participants. Therefore, despite the increased role of virtual communication, face-to-face communication will continue to play an important role in our lives.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habilitation) of Political Studies

We interviewed students, and almost none stood up for keeping distant education once the lockdown is over. A significant part of students felt good about the hybrid education formats. The traditional format of education should remain where it is required. Digital formats of learning should be used where they can optimize certain educational components. Digitalization should comply with educational targets, but not totally replace the experience that has been accrued over the centuries. Students not only learn, but also socialize. If education is fully digitalized, the consequences for young people's socialization are difficult to predict.

## **Sergey Volodenkov,**

Doctor (habilitation) of Political Science, Professor with the Moscow State University, Managing Partner with G3 Communication Group

This situation had a drastic effect on the education. The three month of total digitalization in education clearly revealed their limitations. We will witness the return of elitism to education. With formal and enforced digitalization of the educational process, universities would lose what they have been proud of recently. Digital slavery per se presupposes the emergence of a new Spartacus and the formation of a new human dignity code in cyberspace. Is our society ready for eventual uprisings in this sphere?

## **Mikhail Rykhtik,**

Professor of the Russian Academy of Sciences, Director of the Institute of International Relations and World History of Lobachevsky State University, Nizhni Novgorod

# EDUCATION: INNOVATIONS COMBINING OFFLINE AND ONLINE DOMAINS

The coronavirus pandemic has come as a shock to the global education industry. About 1.6 billion students, or 94% of their total number throughout the world, were affected by the lockdown, including 99% in low- or below-middle-income countries. Almost half of the poorest countries failed to meet the challenge of supporting students at risk.

Despite the success of certain projects, education is the least capitalized industry — public companies' capitalization in this area is only 2.5% of the total market, and in higher education, online services accounted for only 2% just before the pandemic onset.

**The pandemic highlighted new key points: while the educational service providers' equities showed worse dynamics this year than the S&P 500, EdTech stock began growing rapidly.**

The coronavirus will have a longterm effect on education in the world. By 2025, the market size due to the pandemic may amount to 7.3 instead of 7.8 trillion dollars as projected.

At the same time, during the pandemic, the digitalization of education has significantly accelerated. In just one month of the lockdown, the audience of open online courses increased 2.5 times compared to January, reaching 500 million people. According to new forecasts, the EdTech market will grow 2.5 times by 2025.

Having become a driver of progress in education, the coronavirus also creates new challenges for it. While the uptake of technological solutions in this area will intensify, more traditional forms of education will become less accessible, especially in less developed countries. Solutions for hybrid education and teachers' training will become especially sought for in this context.

# NEW LEADERS HAVE TO BE CAPABLE OF BRINGING PEOPLE TOGETHER AND SHOWING THE WAY

The most important quality is the ability to lead people. As long as they follow you, even if in the wrong direction, they're happy. The best leader is one who can lead in one direction, then lead them in quite the opposite, and make the team believe they are going the right way. That is, to believe in what you do and motivate others.

## **Grigory Bakunov,**

Director of Technology Distribution, Yandex

In the digital space, people without any charisma can use their digital alter egos to change attitudes and become leaders. Communicating intensively enough, choosing the right words and creating the right content, one can become a leader, even without being one. Charisma is good in traditional environment; however, in the digital domain, one has to perfect communication elements to win over followers, subscribers, etc. For digital leadership one has to learn how to create an attractive image or organize a team that would do it for you, without letting one's digital image clash with real features.

## **Sergey Volodenkov,**

Doctor (habil.) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

The key component has ever been the same — ability to listen to people and incorporate their aspirations to ensure them that 'the message of everyone having a smartphone was heard', to make people believe their wishes were granted. In business it means a focus on customer.

## **Alexander Baurov,**

Writer, columnist, former Acting Director of the Research and Analytical Center, Roscosmos State Corporation

Good speaking skills, ability to communicate with the audience, including the use of the Internet. Strong emotional intelligence. The ability to move forward, keep abreast with the time. As a leadership tool, communication should be not only catching and non-trivial, it also should include a genuine emotion.

The leader must have a clear understanding to what targets it is best to channel people's energy. Such targets must be justified in the medium and long term.

## **Grigor Badalyan,**

Co-founder, Strategy Director, Stellar communications agency

# TO LEAD, ONE HAS TO EXPLORE THE WORLD AND SEEK TO CHANGE

Psychological stability. Willingness to sacrifice oneself, own's time and interests, but not moral principles. For own company, city, region, country. Work hard. It is impossible to live well and work half-heartedly at the same time. In today's conditions, one has to work even harder. Responsible attitude to work is the key factor.

## **Seyfeddin Rustamov,**

Majority Shareholder of PJSC Metafrax

New leadership requires a number of important qualities, such as: an understanding of the overall state of the world and its current trends; the ability to see paths to long-term sustainable development, without restricting one's time horizon and actions to electoral cycles or short-term political benefits; the ability to unite people in the face of global threats; and a responsible approach to vulnerable segments of the population and the environment. These qualities will allow us to create the conditions for long-term sustainable development in the interest of all mankind.

## **Vladimir Yakunin,**

Head of the State Policy Department, Faculty of Political Science, Lomonosov Moscow State University, Doctor (habilitation) of Political Studies

Real, spiritual, meaningful, or traditional leadership stresses resistance, ability to work in hybrid environments (online and offline), encountering people's completely different ideas and mindsets.

## **Sergey Volodenzov,**

Doctor (habilitation) of Political Science, Professor of the Moscow State University, Managing Partner of G3 Communication Group

We can recall what kind of people Peter the Great was looking for having decided to build the Empire: proactive and open-minded, hungry for new knowledge, capable and hardworking. I assume that in the new world, this list of qualities should be supplemented by the ability to unite people of different professions, motivate them to cooperate and improve their professional skills. This quite correlates with our main purpose to change the world for better through joint efforts.

## **Oleg Gurov,**

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

# THE NEW GENERATION WILL SEEK SOLUTIONS TO THE WORLD'S PROBLEMS WITHIN THEMSELVES

Isolation dramatically changes people's lives, and some changes will remain forever. During the lockdown, people realized what they really need to be happy and healthy. I believe that in the new world we should look inside ourselves. There is no greater achievement than to get to know oneself. I suppose there will be more spirituality in the new world than ever in the previous history. Future leaders will have to be tolerant and humane.

## **Nick Jain,**

IT entrepreneur, India, Forbes Asia 30 under 30

Professions are about to transform, many of those will go completely online. For a long time, there has been a trend that the place of work is becoming less important — now it has only intensified. The attitude towards time will be different. A new ethic will emerge that will become widespread. The time comes for clear tasks and clear management of meetings.

## **Matvey Kukuy,**

Co-founder and CEO, graduate of the 500 Startups accelerator, AMIXR

The current crisis will provide new opportunities for conscious and responsible people who always deal with plenty of tasks and develop themselves, start a business, close it, and launch a new one again. For those who try to learn a musical instrument, who have a purpose, for people who want to live in a better world, travel and enjoy the beautiful.

## **Roman Varnin,**

Musician, producer, director, member of the Malbec band, founder of the MLBC label

The main conclusion I made during the isolation is that our long-term plans get easily adjusted by global trends. We need to put more efforts into cooperation and transparency exactly because of the difficulties encountered. In such conditions, a leader should be open-minded, empathic and sensitive to new things.

## **Vadim Chekletsov,**

Executive Director of the Russian IoT center, Research Associate with the South-West State University

# WHAT DOES ONE HAVE TO LEARN TODAY TO BE SUCCESSFUL IN THE FUTURE?

**1**

## **Ability to change**

The future world is a world of fast speeds. Changes will occur all the time at an increasing rate, which is why the ability to change becomes crucial. This includes redesigning your product, rethinking your business processes, and adapting yourself to the new reality

**2**

## **Communication skills**

Human relationships will come to the fore. The ability to communicate is a skill that will enable you to establish effective cooperation, present yourself, your ideas, and navigate in the data stream through cool storytelling.

**3**

## **Ability to learn**

We don't know what specific occupations will be in demand in the future. That is why competences as such become less sought for than before. The ability to master skills fast — the ability to learn becomes a priority.

**4**

## **Trendwatching**

A successful person of the future thinks strategically. They analyze trends, study them, and eliminate the unnecessary. We will have to be always open to something new and try and timely integrate the things with the disruptive potential into own practice.

**5**

## **ABC of finance and business logic**

Economic efficiency becomes a focal point in the economy of the future. Therefore, the 101 of finance and the ability to set up business processes are important skills that should be mastered right now.

**6**

## **Empathy**

The world of the future will be very "small" and interconnected. In order to successfully maintain long-term relationships with people of different views, races, cultures, genders, and faiths, you need to develop empathy. With this quality, you will be always capable of generating the value others will be willing to pay for.

# 7

## Critical thinking

The incredible growth of consumed information volumes is already a fact of our life. Further, there will be ever more information and it will become more complex. In such a world, it would be extremely difficult to make truth from fiction. In order not to fall prey to someone's manipulations, you need to develop critical thinking that will enable you to distinguish fake news from the real situation.

# 8

## Cross-disciplinarity

All sectors get more interconnected. It is no longer enough to be just a first-class expert in a narrow domain. The world of the future is a world of cross-disciplinary people who, on one hand, are deeply immersed in their narrow field of expertise, on the other are aware of many different spheres. We are in for incredible breakthroughs at intersections of technology and design, biology and engineering, art and big data.

# 9

## Understanding of technologies

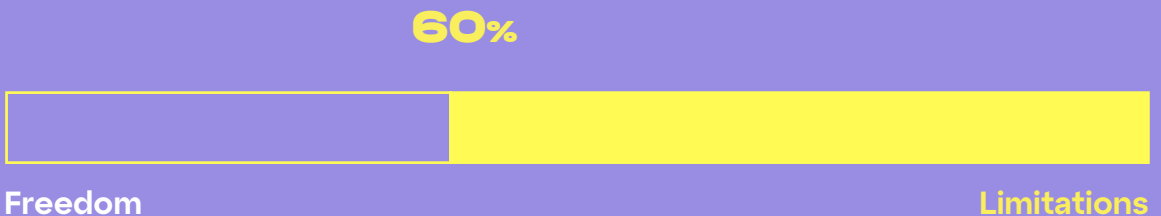
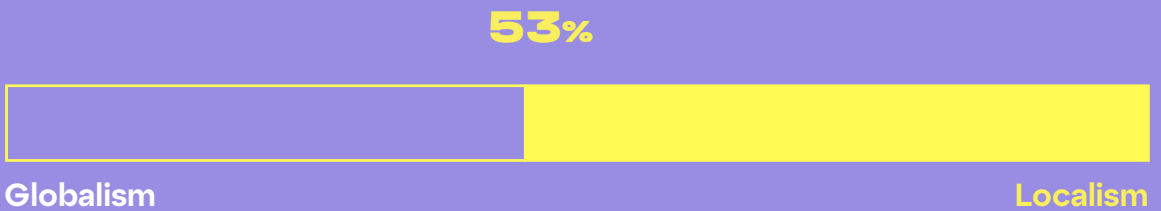
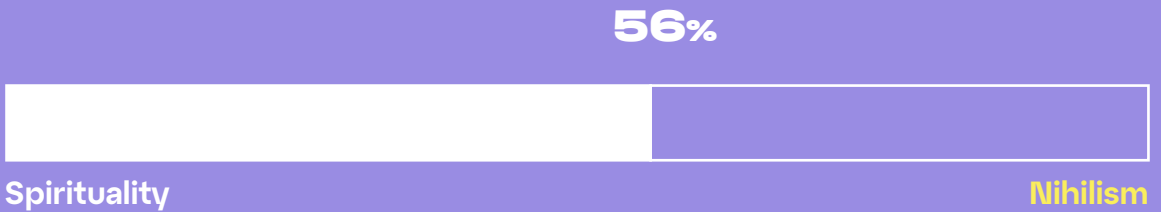
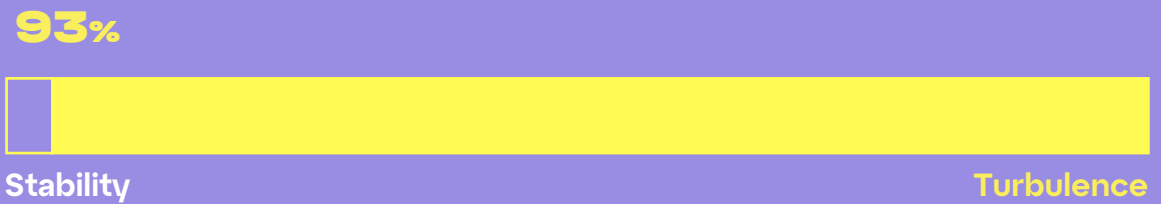
Technologies came to our daily life to stay. This trend will further develop. In order not to find yourself on the other side of the digital abyss, you should learn to understand the basics of programming, the way artificial intelligence or computer vision work. Understanding technologies will enable you to effectively set targets for your team, develop new incredible products, and effectively filter information.

# 10

## Health

In the 21<sup>st</sup> century, we will face dozens of crises and turbulent periods. Therefore, a special focus in this race for progress should be on yourself. Our health, both physical and psychological, should be in the focus for the decades to come. Exercise, meditate, study your sleep or genes — your priority should be to save and improve what you already have.

# WE ASKED OPINION LEADERS WHAT FEATURES WILL BE DOMINANT IN THE FUTURE





# THE COMING ERA GIVES HOPE FOR A BETTER FUTURE

I think that now is the time for realignment, a turning point, a reset of a kind. So I expect no stability in the near future. But I would not define these phenomena as turbulence either, since for me, this concept is associated with processes beyond control while the rapid changes that I outline mean construction of something new, therefore, they are positive and productive.

I observe and expect further development of the system of civic control based on the code of ethics as a regulator of social processes. This is the way for transition from industrial civilization to a new environment in which an individual will be of highest value. Of course, there is no place for nihilism in these processes, and what we often see now — post-truth, fake news, manifestations of hate, and various types of discrimination — are sick and ugly byproducts of the formation of a whole new civilization that will be based on “human-centered” ideals.

## Oleg Gurov,

MBA, CEO of the Business Competence Development Centre, lecturer with the Russian Presidential Academy of National Economy and Public Administration

We may see the end of the age of nihilism. In a sense, today we see the results of nihilism such as two world wars (or one with a break), fascism and communism which, although they cannot be reduced to nihilism, would be unthinkable without it.

It is clear that some things could stay for 200–300 years, but could it be a key phenomenon? What will come to replace it?

At least the time of nihilistic enthusiasm is over, as is the time of theoretical nihilism.

Based on my intuition, I can say that we have had enough of nihilism... I think we will see a new Renaissance, a movement towards spirituality...

## Timofey Sergeytsev,

Political consultant, philosopher, representative of the methodological movement

Made with Love and Faith in the Future

Conclusion

# FIRST GLOBAL EXAMINATION OF THE CENTURY



# HEADER

## 1

### **Widening gap between the worlds: online and offline**

The coronavirus has forced the world to master the digital space in such previously unusual areas as healthcare, education and even live concerts. Duration of streaming service usage increased by 119% at the end of March compared to the previous year. When the need to comply with quarantine measures is gone, few will return to their old habits. While digital services have achieved economies of scale, offline services will now need to raise prices to offset losses and maintain profitability. The services that existed at the junction of the offline and online worlds have also suffered, as the connection between the two has greatly weakened.

## 2

### **New barriers in communication between people**

Even before the epidemic, people averaged 2.5 hours a day. The tidal wave of various information in messengers and social networks has caused discrepancies in the fight against coronavirus and has led to an influx of fake news and conspiracy theories. It showed how fragmented society had become, divided between group chats and online communities. The ability to move freely between these information bubbles and separate truth from speculation will be the most demanded quality of a person.

### 3

#### **Demand for local and change of lifestyle**

During the pandemic, the living space of people shrank to the borders of countries and cities, and for some time of their apartments. This has led many to rethink the balance of the home-work-vacation. It is not surprising that during the epidemic, the demand for suburban real estate has sharply increased: for example, on one of the specialized portals in the United States, the number of requests related to the purchase of housing in rural areas increased by 115% in March. In the future, people will value more not only life outside the city, but also locally produced products and domestic tourism. This can affect both the growth of local patriotism and the tendency towards isolation.

### 4

#### **Rejection of capitalism and search for the new values**

The coronavirus has clearly demonstrated the shortcomings of the world order based on capitalist values. The first months of the pandemic, which came as a shock to humanity, revealed the inability of business to provide adequate response to the challenges facing humanity, and states took unprecedented measures to restrict business activity in order to save the lives of citizens. The dependence of global healthcare on corporations

has become evident. In the United States, which has the highest number of coronavirus deaths, treatment bills have left many families in debt, and a failure to pay for treatment has led to a disproportionate death toll among minorities. Thus, the mortality rate of African Americans exceeded that of the white population by 2-3 times. The situation was aggravated by massive layoffs, leaving many without corporate insurance.

### 5

#### **Shifting center of global power and the rise of Asia**

The coronavirus has demonstrated a lack of global leadership - both on behalf of international organizations and of individual countries. Contradictions within organizations such as NATO and the EU were also exposed: in a desperate situation, the United States and prominent European countries focused on their problems, while the rest, lacking the means and equipment, were left to fend for themselves. The effective actions of China and other Asian countries, which allowed them to relatively quickly stop the epidemic, will be another argument for their leadership ambitions. All this can lead to a shift in the balance of power and the rules of the game around the world.

## 6

### **Increasing control over a person's life**

The epidemic has imposed stricter limitations not only in the physical space, but also in the virtual. The latter, in the context of the introduction of digital control over the movement of people, has become even more significant. Their protection is handled by both states and IT corporations, which are increasingly claiming public influence. Against the backdrop of the fight against terrorism and geopolitical tensions, we will see an even greater tightening of control, which will become the subject of competition between states and corporations.

## 7

### **Sharing economy and departure from private ownership**

Although the pandemic has temporarily shaken the position of sharing economy services, their relevance will only increase over time. People will need to use their resources more efficiently, with an emphasis on flexibility and strengthening their social connections. In addition, in many cases digital sharing economy services have become a safe replacement for more traditional options such as public transport or public catering.

## 8

### **Creativity as a necessary quality**

As more work processes go digital and robots get better, so does the potential for automation. In certain areas such as hospitality and catering, 60% or more of human work can already be replaced. This forces people to look for new ways and opportunities to realize their potential and focuses our attention on creativity and soft skills. The plethora of new technological opportunities will require new ideas and new content to make them meaningful, and this is what cutting-edge industries such as IT, media and telecommunications will be looking for.

## 9

### **Renaissance of spirituality and attention to mental health**

Lockdown became a serious challenge for people's psychological stability: according to official data from the United States, the number of complaints with mental problems increased significantly, and the number of deaths from opiate overdose doubled YoY in several states, with a peak between March and May 2020. Finding themselves all by themselves, many acutely felt the degree of alienation that had penetrated their lives even before the pandemic. This problem will become an impetus for rethinking life goals, paying more attention to spirituality and mental health.

# 10

## **New leadership driven by communication**

In the environment of total disunity and disarray affecting people's everyday lives all around the world leadership will require special skill in communication. Understanding the changing spirit of the times, the ability to anticipate trends and see ideas that can bring people together — all of this is increasingly associated with technologies that can overcome boundaries arising between people. The ability to build personal and corporate brands that embody the values and aspirations dominating the mass consciousness will play a significant role.

# ELECTRIC

**The coronavirus epidemic became the first serious test of strength for humanity in the 21st century. It is quite possible that it will become that turning point from which the transition to a new era will be counted, and how we pass this test will determine the world for years to come. And while the future prepares many more surprises for us, one thing is clear: the coronavirus, like a litmus test, has revealed the problems that had been brewing for several decades. Now it all depends on whether we find the courage these problems and what actions we will take to achieve this.**

Inequality in property and income, in access to clean air and relevant information — all these are different manifestations of the injustice that was established in the world on the eve of the pandemic. In a broader sense, we can talk about the loss of connection between people, a failure in communication that prevents people from different continents, from different countries or even from neighboring streets to understand each other, real-

ize the need for mutual assistance and change their behavior in order to make the world a better place.

Inequality at different levels has developed in the context of objective factors — demographic shifts and technological progress — and the absence of a global consensus on the management of associated risks. The inability of people to come together to solve problems in specific communities and parts of the world has made these problems universal in the face of the pandemic. This state of the things was just as well reflected in the approaches of business to communication with its stakeholders, and today it is time to change these approaches.

For a long time, the main principle of brand promotion has been consumer segmentation. This principle was reinforced when algorithms in the field of media learned to offer users exactly the kind of content for which they demand, and exactly the ideas with which they tend to agree, forming the so-called “echo chambers”. The emergence and growth of information bubbles became especially evident in the period of the coronavirus epidemic, when disinformation and conspiracy theories in closed group chats began to replace conflicting information from official sources. The division of people by wealth, education level, problems they face, and attitudes has become legalized in brand communications, and personalization in content delivery has



consolidated the resulting communication gap. Now is the time for brands to build bridges, not just in words, but in deeds.

The demand for unity and overcoming differences has been reflected in the calls of the leading business experts for several years. For example, in 2014, Frederic Laloux, in his book «Reinventing organizations», described a model of a new type of organization, which he called «teal», formulating the three main principles of these organizations:

# 1

Wholeness as enabling employees to present their full personas rather than just their work personas;

# 2

Self-management as a system based on peer relationships with no need for hierarchy, consensus, nor central command and control;

# 3

Evolutionary purpose as the idea to follow the natural evolution of how the organization grows.

**Similar features — authenticity, equality, adherence to its purpose — organizations of a new type should also reflect in their brands.**

Already today we see two important trends in brand positioning, which speak of the emerging demand for a new type of brand communications:

**In the corporate sphere**, there is an increasing shift towards the consumer. Many traditional b2b companies that used to be at the early stages of the production chain began to master b2b2c models, and their communications are increasingly turning to the end consumer.

**In the consumer sphere**, the transition to the One Brand principle. The packaging and marketing messages of the product itself are no longer enough: it is important for consumers to understand what ideas and what people are behind it, whether they can associate themselves with them. The architecture of the brands in the product portfolio is becoming more integrated and the connection to the parent brand of the manufacturer or supplier is strengthening.

The relevance of these ideas about business organization and brand management became especially evident during the quarantine. Companies that follow the flexible principles of teal organizations, that communicate directly with the end consumer and that are able to develop their brand in new directions without eroding its value, have suffered less from the crisis and were able to quickly adapt to the new realities. Now they need an idea that will tie the successful practices together and guide them further towards the future in the post-coronavirus world. Such an idea, the Big Idea of this time should be Unity.

In contrast to the brands of the outgoing era, which preached globalization and the values of individual consumption, Unity Brands will pay attention to local communities and what binds them: solidarity, mutual assistance, friendship, local patriotism. These will be activist brands, but their focus will not be on differences — gender, racial, age — but, on the contrary, on big and small challenges that unite people regardless of belonging. Not in words, but in deeds, they will “think globally, act locally.” These will be activists, but not political activists, but civilian. Leaders, who are not making others to follow, but inspiring to take action.

Such brands will have building communities as the core of their purpose, and that’s why people will become their loyal followers. In an era of remote work and remote communication, an unstable present and an unpredictable future, Unity Brands will become a guiding star for people who will perceive the pandemic as a call for greater consciousness and responsibility — not only to themselves, but also to the loved ones and the world in which they live.

# PRESIUM

Speaking about changes in the world, we would like to divide everything into two important topics:

## 1

### World epidemic

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## 2

### Economic recession, political and moral crises

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If we talk about the global epidemic, then this is really no “black swan”. Such epidemics have always occurred and will continue to occur. They were often local and only concerned some local communities. This time, everything is much more serious - the epidemic has become a global problem, and there are no countries that have not faced it. Now we see how many states are experiencing enormous difficulties in the fight against the spread of infection. Largely due to the lack of effective policies for such situations and a very slow response rate of officials.

What can this lead to? Reassessment of the influence of the state on people’s lives. Those countries that have responded poorly or slowly to the

threat will face big changes in political governance. People will demand change because trust has already been lost. Where states have successfully coped with the threat, there is a unique chance for politicians to introduce reforms and further increase confidence in their political systems. If we talk about business, then the main thing that the epidemic does is accelerate all the processes that had already started. We seem to have made a leap for several years ahead. Everything old and obsolete, such as offline education, was forced to fall, and by “violent” methods the new and relevant began to emerge.

**Indeed, for many people, everything that happens is absolutely uncomfortable. Just any changes though. But a person quickly adapts, and we are absolutely sure that the “new world” will soon become a “new norm”.**

The ongoing economic, political and moral processes cause much greater concern. We talked a lot about imbalances in the second section of the report, and now we are seeing their consequences around the world. In the next 5-10 years, we will see colossal changes in all areas of business. From seeing a string of ineffective or slow companies going bankrupt and governments nationalizing or bailing out the biggest players in the industry, to the emergence of a large number of new super flexible unicorns.

We are going to see big changes in the way we work. After the crisis, a large number of employees will continue working from home, because there is no point in spending 3-4 hours a day on the way to work and back. We are expecting an increase in the quality of infrastructure around the largest cities. Starting from the creation of co-living places, ending with the penetration of online delivery services and high-speed Internet.

Big changes can be expected in the venture capital industry as well. The crisis has shown that companies that are very smart about money (both their own and those of investors) are of real value. There will be a big re-evaluation of the value of unicorns and a change in investment approaches. Much more often investors will give money to an already working project with solid traction a predictable business model than just with an idea.

**In any crisis, there are winners and losers. Here we think there will be no big bias in some certain direction. The only thing that everyone should finally understand is that it will always be this way now, and perhaps very often.**

The only way to protect yourself is to spend money wisely, increase your safety margin (health, financial cushion, etc.) and be open to constant changes. Yes, many people will lose their jobs in the next few years. But many will find a new one, much more interesting. Some industries will slowly wither away, while others will flourish - after all, it has always been so!

The PRESIUM team is looking forward to the future. We have quickly adapted to the changes, transferred employees to a remote mode of work, and just a few days after leaving the office, we calmly continued to work. Thanks to our financial cushion, we managed to calmly survive the April panic of clients, when events, meetings were canceled and projects were postponed. After that, everything returned to the same levels as before the pandemic.

**We are absolutely certain that the role of visual communication, storytelling and quality education in the new world will only increase.**

Businesses will have to be even more responsible in preparing materials for important meetings, conferences or negotiations. It will be even more difficult to convince the client, investor, employee of the necessary actions due to the increasing information noise.

We see several key changes that will take place in the world and in Russia in particular:

## 1

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**Ditching internal teams within companies in favor of quality contractors**

Remote work will greatly contribute to this trend. It makes no sense for corporations to cultivate a non-key competence, to setup large layers of management on it, accumulate inefficiency and lag behind highly specialized players in the market. Corporations in the new world are a set of independent, distributed, small teams in key areas and a pool of high-quality contractors for everything that is not a key competence (accounting, IT support, design, visual communications, training).

## 2

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The growing need for quality stories that impress, inspire and motivate people to take action

Typical «business presentations» are about to end. We are waiting for an era of personalized content for different audiences, adaptive content for different situations and live content that changes in real time. Demand for data analysis and interpretation, for systems with feedback and interactive solutions will increase, demand for AR and VR technologies will grow. If earlier a person could come up with an idea and tell millions about it, then in the future he will have to tell a different version of the idea to different groups of users, adjusting to the venue.

**We believe that the crisis that is happening right now will only help to get closer to the future, but we will all have to make great efforts to manage to adapt and adjust to these high speeds. Otherwise, there is a risk of being left behind.**

# THIS REPORT IS BROUGHT TO YOU BY THE JOINT TEAM OF ELECTRIC BRAND CONSULTANTS AND PRÉSIUM

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## **ELECTRIC BRAND CONSULTANTS**

[electric-consultants.com](https://electric-consultants.com)

We are a team of strategists, analysts, writers, designers, developers and managers passionate about helping brands find their true value for people through better and more honest communications and promises that are directed to build a better future.

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We create visual communications that make management processes easier and increase business efficiency. We tell about complicate things in a vivid, simple and structured manner helping companies stay competitive and respond to the challenges of the modern world.

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