



2020

The Decade ahead

2030

Unthinkable (but not impossible) forecasts

Digital & innovation

Oliver Cooke tells us his vision for the “Digital decade” ahead and other possibilities for the future of the world. Read his five forecasts here.



Oliver Cooke
Chief Digital Officer

Let’s start with the realistic outlook and the status quo

1. The coronavirus crisis has impacted the world in a myriad of ways. What’s surprised you the most?

I think it is very interesting and surprising that science hasn’t played a larger role in determining the policy responses. One of the stories we tell ourselves about modern society is that it is analytical, measured and rational. But realistically, in most countries even now we still have very little knowledge of how many people had the infection. It seems that many policy-makers hadn’t the key facts they needed to make their hugely significant and unprecedented decisions. When we look back, we’ll probably think – gosh, look at how uninformed we were.

2. Has the coronavirus crisis disrupted the digital transformation path?

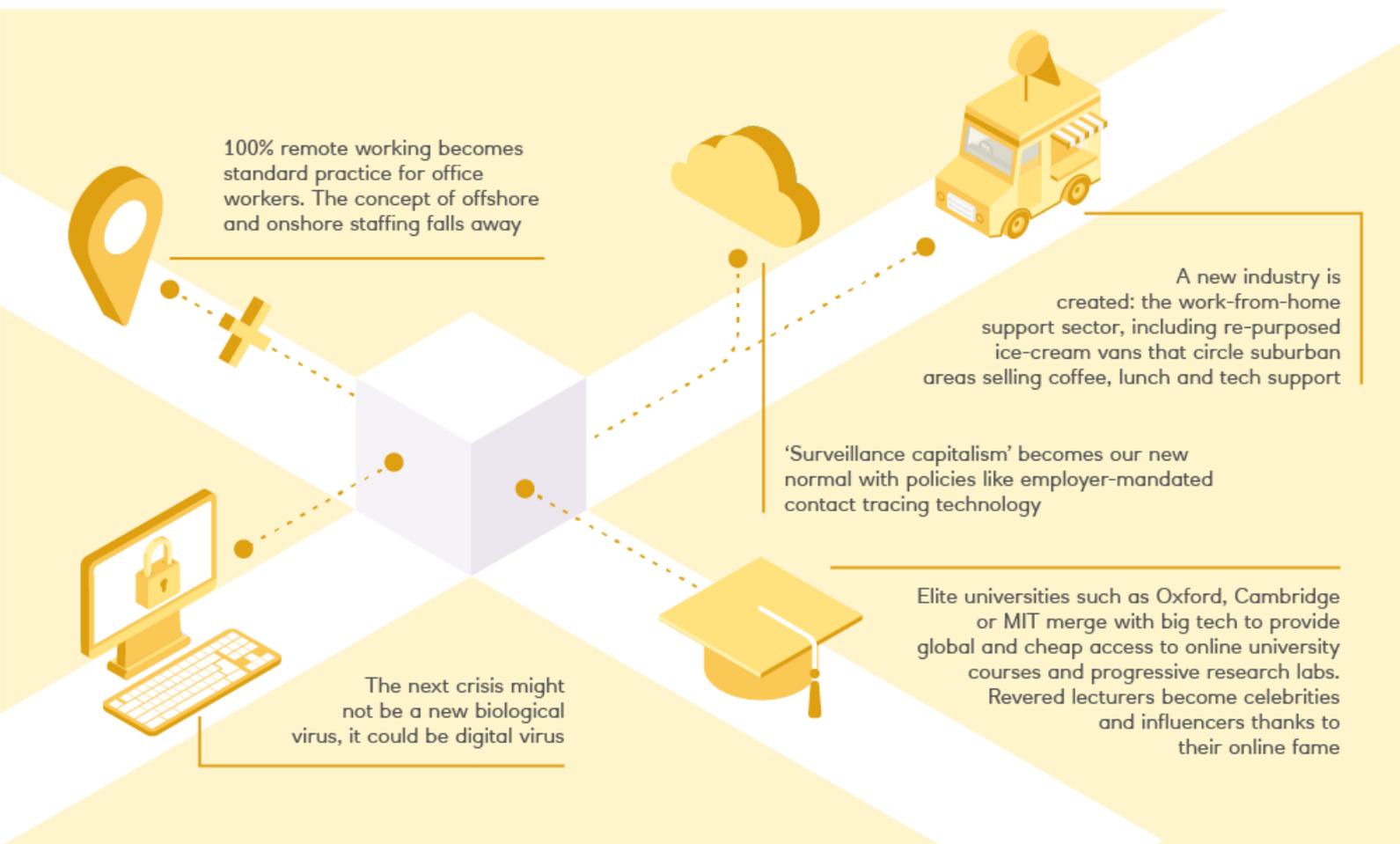
When it comes to digital transformation, the coronavirus crisis won’t disrupt the transformation itself, but I do believe that it will accelerate things. Aside from obvious aspects like accelerating the move to working from home and to digital services, we have seen other digital innovation in just a short period of time. For example, the crisis sparked ideas about greater robot and artificial intelligence adoption in society. Nurse-like robots were employed in hospitals while self-driving bots helped with cleaning and disinfection. Artificial intelligence (AI) smart glasses have been used to scan crowds for fever, drones have been delivering medicine and global tech companies have created new healthbots. And in fact AI scientists have developed fact-checking tools for Covid researchers to scan through the flood of papers and notes on Covid.

3. Would you go as far to say that digital readiness has been critical to surviving this crisis?

Lockdown measures and changes in behaviour have disrupted businesses at extraordinary and completely unexpected levels. Digital readiness, yes — but also, digital adaptability and agility have been critical to survival.

For many organisations this crisis has pushed them to focus on their digital strategy. Businesses based on a digital model or with a robust digital strategy have seen their markets reposition towards them. Take cinemas for instance — an already slowing industry, they were forced completely out of action due to lockdown, while streaming services thrived - Netflix had twice its expected growth and added millions of subscribers¹. And the race to embrace digital channels became more important than ever, for example, Universal Pictures responded by making movies available to stream at home the day of release, going completely against the traditional 90-day wait.

Note: (1) <https://www.forbes.com/sites/greatspeculations/2020/04/28/netflix-subscriber-growth-2x-expectations-good-news-or-peak/#5c0f6fad3ea1>



And what about your wacky forecasts — ones that are totally unthinkable (but actually possible)?

4. The remote working agenda is now one of the world's top digital priorities. Will we all revert back to pre-crisis patterns?

Wacky and unthinkable (but actually possible) forecast: 100% remote working becomes standard practice for office workers. The concept of offshore and onshore staffing falls away

Working from home was indeed already on the agenda for many businesses, but the coronavirus crisis gave it urgency, driven by the need for social distancing. Yes, some will revert back to pre-crisis behaviour and head back to the office full time. But in general, I think the length of the crisis has been long enough to be habit forming and I expect the days of resistance to flexible working locations are behind us. I've read some very compelling views of how the pandemic will increase nationalism and decrease globalisation. A counter argument is that increased remote working will see a more deeply integrated and connected global society.

For any businesses exploring their options — whether that's shifting to an entirely remote workforce, creating more 100% remote working contracts, or applying an optional two to three day working from home week — there are many benefits. Enabling access to a global talent pool, improving diversity and lowering costs are among the list. And these are big incentives to resolve the mechanics and operational challenges such as the legal employing entity, cross-border legislation and tax. But remember, location will also have implications for take-home pay, especially when bigger city-weightings won't be so relevant any more. Interestingly Silicon Valley could be hit hard in this respect. Other 'softer' elements such as building culture and measuring productivity also need to be considered. In reality, I expect it will probably end up being more like an average of 60% of time at home with 40% in the office for most. It's worth remembering one survey in the UK, just 9% of people wanted life to return to "normal" after lockdown, and part of that is their working life*.

*YouGov poll, April 2020 as cited [here](#)

5. Does this mass shift to digital bring any risks?

Wacky and unthinkable (but actually possible) forecast: The next crisis might not be a new biological virus, it could be digital virus

A key characteristic of this event is not just the magnitude but speed, too, and shifting towards digital can also lead to risks of similar size and speed. One can easily imagine a massive and fast event linked to technology failure of one sort or another. The digital world also has viruses, key infrastructure can be infected, and also we are increasingly reliant on a short list of essential software. I'd guess that key digital infrastructure becomes more regulated, in the same way as physical key infrastructure.

The crisis will have imprinted on many businesses a need to focus on resiliency, and for many now this will be more focussed on digital resiliency. Perhaps offices should not throw away those fax machines just yet...

6. How else will the digital transformation change the working world?

Wacky and unthinkable (but actually possible) forecast: A new industry is created: the work-from-home support sector, including re-purposed ice-cream vans that circle suburban areas selling coffee, lunch and tech support

One thing I've learned from working from home over the last couple of months is that I would definitely use this ice-cream van service, can I patent the idea?

The white-collar working world as many know it will change in many respects, especially in terms of remote working. Long-standing and deeply enshrined processes have been forced to change because of the crisis, and this opens up the possibility that these have changed for good. Even traditional services like solicitors might now move to an entirely online model, doing away with the need for paper, wet signatures and posting documents. This will force us all to use new digital and collaboration tools.

This increase in home working, and a breakdown in barriers to off-shoring, has implications for all sorts of things, from urban planning to workforce diversity, wages, and even to employment laws and data regulation. There is also an inequality angle – some parts of society are poorly prepared for this transition and don't have the resources to participate fully. We are already on course for a huge digital transformation, and it's going to leave some people behind.

7. So the white-collar working world is going to change as we know it. What about other parts of society?

Wacky and unthinkable (but actually possible) forecast: Elite universities such as Oxford, Cambridge or MIT merge with big tech to provide global and cheap access to online university courses and progressive research labs. Revered lecturers become celebrities and influencers thanks to their online fame

Today, universities offer education with a valued certificate, and a life experience. The first of these two is ripe for disruption. The coronavirus-driven move to online tutorials and lectures has highlighted that much of the education process can be done cheaper, flexibly and en masse digitally. This possible delivery model, combined with a likely wave of restructuring for many universities who are in financial dire straits could lead to a radically changed university landscape. Universities with great brands among students, who can attract the best teaching talent, and who have the digital budgets to give a great learning experience will come out on top. Big tech, with their budgets, brands, and thirst for data will get involved.

The move to mostly digital learning will mean however that the young-adult experience becomes unbundled from getting a degree, and in fact getting a degree may drift away from being something that you do as a rite of passage as a young adult.

8. What are your views on the new tech and innovation that's now being integrated into daily life such as contact tracing?

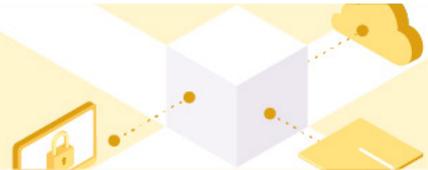
Wacky and unthinkable (but actually possible) forecast: 'Surveillance capitalism' becomes our new normal with policies like employer-mandated contact tracing technology

It might have been unthinkable before the crisis, but now, a fully surveyed world really is actually looking more plausible. If you think of contact tracing as a way to meet obligations (possibly even laws) required to keep employees safe, comprehensive surveillance doesn't seem so far off, including by for-profit companies. I can envisage a world where employees have staff wear monitors or wristbands that set off alarms when you go within two metres of someone, for example — imagine that! Maybe that is too wacky and unthinkable...

So perhaps we won't reach this extreme, but it is very likely that tracking is going to play a bigger role. This is going to bring to a head the debate about costs and benefits of more information about people, including privacy, and data ethics - and I reckon that surveillance will win. So far in this crisis, people have followed very invasive demands from their government during lockdown and more-or-less have complied. Many people across the world have devices such as Amazon's Alexa, which means they are willing to take this trade-off of the benefits of giving up information about themselves, versus the possible costs.

In terms of the contact-tracing technologies and applications such as those released by the National Health Service, a question I have is — what happens to the app when we're over the crisis? Do they extend it for the flu or other diseases, for example? Will they repurpose it to fight crime? If there is another health scare it will almost definitely be used, after all everyone will likely still have the app on their phone, won't they? And then surveillance may just be an ordinary expectation? Remember when google street view came out — critics hailed it as mad, invasive, and outrageous. But now it's totally normal. Then again, there will probably also be a backlash from those who are digitally purer and resistant to these sorts of surveillance measures. There's a Hollywood movie in this, for sure!

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