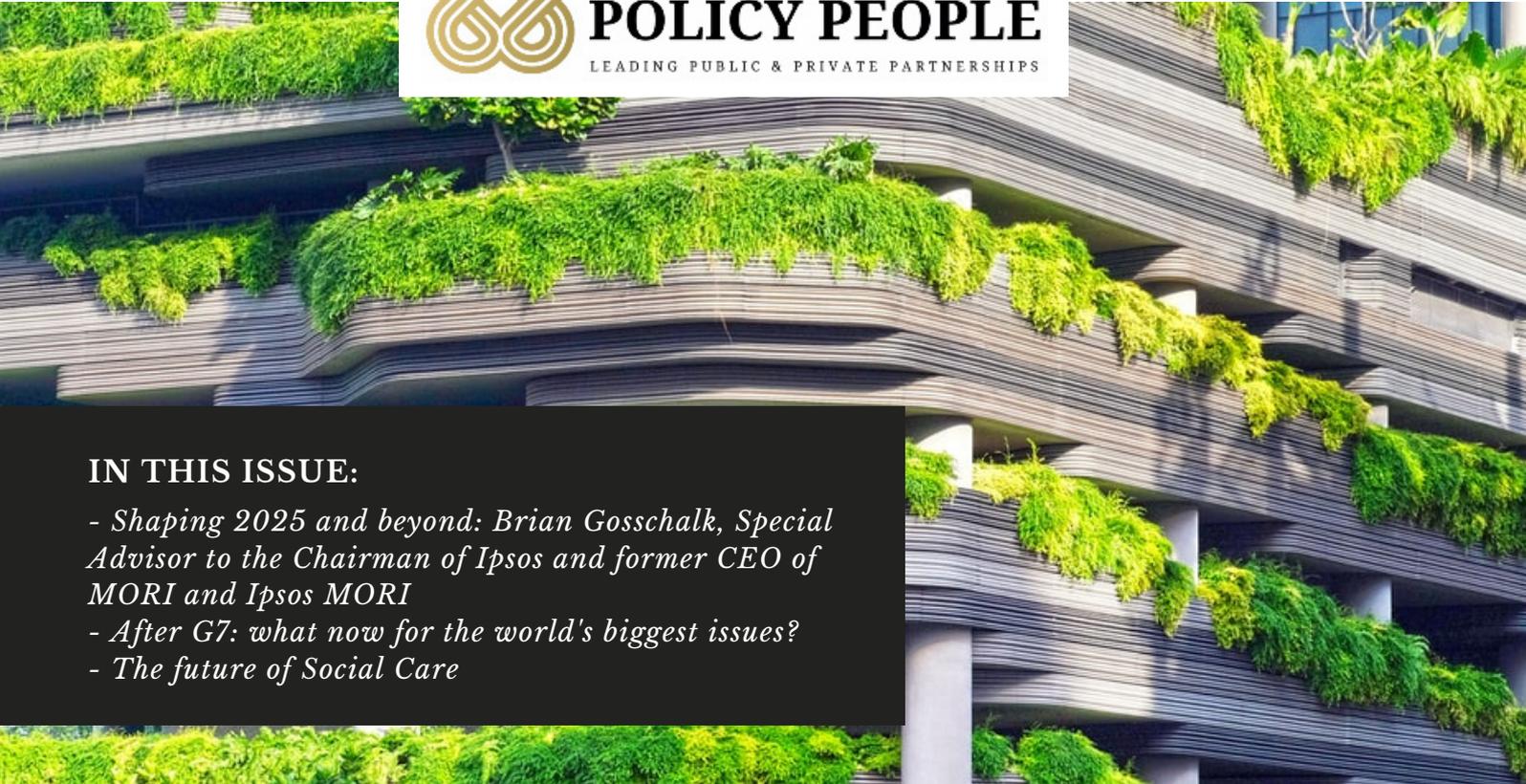


SENTENTIA



THE
POLICY PEOPLE
LEADING PUBLIC & PRIVATE PARTNERSHIPS



IN THIS ISSUE:

- *Shaping 2025 and beyond: Brian Gosschalk, Special Advisor to the Chairman of Ipsos and former CEO of MORI and Ipsos MORI*
- *After G7: what now for the world's biggest issues?*
- *The future of Social Care*

SHAPING 2025 AND BEYOND...

Visioning the world of 2025: certainties, risks and longer-term implications



*In conversation with our Thought Leadership Ambassador:
Brian Gosschalk, Special Advisor to the Chairman of Ipsos
and former CEO of MORI & Ipsos MORI*

Now, of all times, is a sensible point at which to follow the old adage: “never predict anything, especially the future”. Why? Because you will almost certainly be wrong. The known unknowns, and the unknown unknowns, are huge.

And yet, and yet: many decision-makers are, quite sensibly, thinking pragmatically about what to do next. Businesses, governments and the not-for-profit sector are all grappling with some crucial questions. Where should resources be invested for the climb-out of COVID-19? Which of the many disruptions we have seen will lead to continued change? Which will fade if - and when - we revert to a world more like 2019?

(Cont.)

It may be helpful to outline just a few of the key factors to think about as we wrestle with the pandemic and grapple with its consequences.

Some certainties can be considered as extremely likely in the world of 2025 - some rooted in longer-term macro trends, others representing medium-term shifts. These certainties include:

*CERTAINTY &
UNCERTAINTY
TO 2025*

- **Planetary challenges:** we know we must decarbonise, rescue and regenerate our fragile ecosystems; invent and roll out new economic models for a net zero world; and deal with economic and environmental migration and population volatility throughout the world.
- **Trends in society:** while education levels rise and we become more connected than ever digitally, inequality and global poverty are increasingly urgent challenges. In the West, we see conflict between social groups increase, and we must address the crisis in mental health exacerbated by COVID-19.
- **The age of automation:** in a world where data is power and systems are increasingly algorithmically driven and automated, humanity must find ways of creating equity and value. The COVID-19 pandemic has accelerated some trends in connectivity, and remote working is likely to continue through the next few years.
- **System-level change:** while the next five years will remain the age of the nation state, there is the potential for new power-brokers to enter the arena, in the form of corporations which act in the wider interests as well as to increase their bottom line. COVID-19, again, has made it imperative to think about the system-level connections between people, and the next five years will be focused on improving our systems to improve our resilience in every space - from health, to the economy, to the personal.

"Currently, there are two axes of uncertainty: the economic picture, and the tension in demographic, social and political values."

*Brian Gosschalk,
Special Advisor to the
Chairman of Ipsos and former
CEO of MORI & Ipsos MORI*



(Cont...)

The way the world responds to these certainties, however, is not so simple to map. There are two important axes of uncertainty:

- The economic picture – do we face recovery or recession?
- The tension in demographic, social and political values – will publics support a progressive social approach to meeting these challenges, or will they prefer to stick with what they know? And how will this differ between different groups/sectors of the population?



A CORE PATHWAY?

Different scenarios are possible, with very different potential outcomes. Based on what we know now, a “core” pathway is the most likely route ahead over the next five years. We could, in fact, describe it as: a *long march back towards the place we knew*.

What might this world look like?

It is a familiar world. Under such a scenario, the pandemic changed many things, but by 2025 much of the world looks - superficially, at least - as it did in 2019.

But how sustainable is it? This world is relatively stable; especially as climate change has not yet turned to widespread, frequently-occurring climate disasters, and there are no tangible signs yet of further pandemics on the horizon. However, there are fractures under the surface. This world is less resilient than 2019, with high levels of debt which have been underwritten by central banks. There is growth, and investors are generally confident. But there is also stalled social progress. Young people in particular are facing consumer debt and job insecurity, and there is considerable inequality between ethnic groups, genders, and social classes.

We avoided complete collapse, but we have not ‘built back better’. The pandemic has accelerated some important innovations, such as digital transformation, the data-driven economy, a rise in automation and AI, investment in green energy, and some collaborative technology regulation. But the future of globalisation, growth, environmentalism, consumption patterns, technology and inequality is as unclear in this world as it was in 2019.

(Cont...)

- **Standards of living continue to improve for consumers in the global middle classes.** Younger and more radical groups grumble, feeling that we ‘missed a real chance’ to accelerate social progress. At the same time, older people are pleased to get ‘back to normal’ – not least in order to buy the world some time to address the next crisis.
- **Brands continue to develop their social purpose.** Responding to ethically-minded consumers and the threats to their own supply chains posed by climate change, companies and citizens are getting closer to working towards the same future.
- **Global tech companies have capitalised on the post-pandemic digital economy.** Citizens rely on them for recruitment, banking, travelling, communication and healthcare.
- **Russia and China have created different internets, with different regulatory frameworks.** In the West, there have been no dramatic changes to regulation of media or internet. Consumers increasingly feel that large tech companies are too big and unresponsive, while nations and companies guard, trade and ‘weaponise’ them.

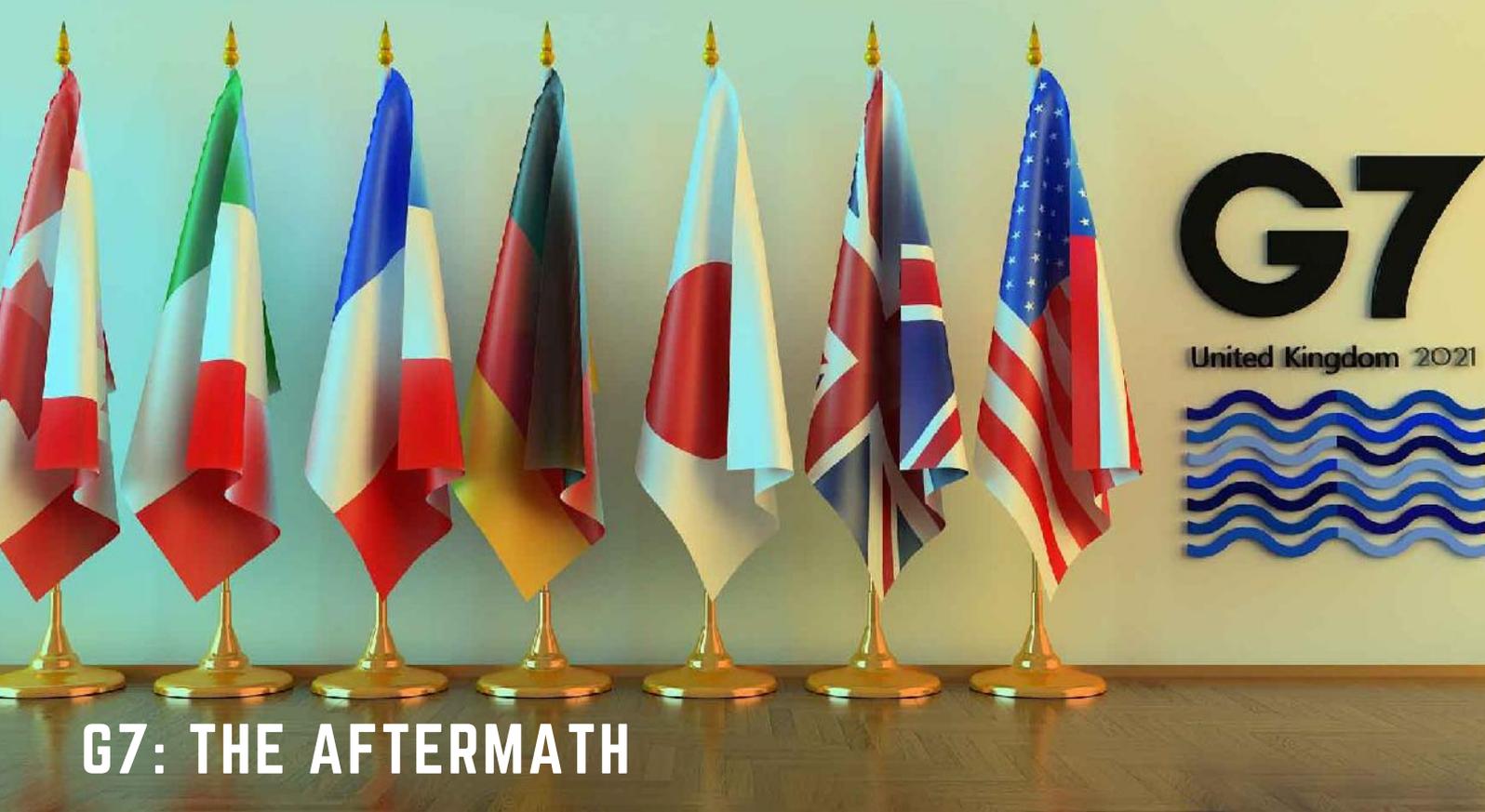


IPSOS ADVOCATES A MULTI-DISCIPLINARY APPROACH TO CREATING A SUSTAINABLE MONITORING FRAMEWORK

The world of 2025 (and beyond) may be based on some of the core pathway laid out, but it will also contain elements of others. To find out what will happen, one can monitor the development of key events in the world, which might take us down our core pathway, or in other directions.

This requires a multi-disciplinary perspective to create a suitable monitoring framework. We will do this at Ipsos and on behalf of our clients, in the belief that using these indicators in a practical way can help inspire both our/their actions today, and reduce the risks inherent in long-term planning for the future.

Many thanks to our Thought Leadership Ambassador, Brian Gosschalk. For further information or debate on this important topic, please email Brian at: brian.gosschalk@ipsos.com.



G7: THE AFTERMATH

Under the Presidency of the UK, the 47th G7 Summit was held between 11th and 13th June 2021 in Carbis Bay on the Cornish coast of England. Participants included the leaders of the seven G7 member states (Canada, France, Germany, Italy, Japan, United Kingdom and United States), as well as two representatives from the European Union (Presidents of the European Commission and the European Council). Invited guests included the Prime Ministers of Australia and India and the Presidents of South Korea and South Africa.

Expectations were high, and driving the policy priorities, the UK's Presidency wanted "... to unite leading democracies to help the world fight and then build back better from coronavirus and create a greener, more prosperous future."

So - what was achieved?

Probably more in messages and agreements than in substantive actions. EU figures, - especially 'hardliners' including French President Emmanuel Macron and President of the European Commission Ursula von der Leyen - clashed in the dispute with the UK over Brexit and the Northern Ireland protocol. US President Joe Biden widened the discussion, stressing any dispute should not undermine the Good Friday Agreement.

'Resilience' was a key word, moving well beyond ensuring preparedness for another pandemic to economic and political policy, garnering "market systems which are resilient to natural or deliberate disruption in critical sectors affecting national, economic or human security."

The issue of raising corporation tax around the world was well-highlighted, but balance between nation state and corporate power is much broader. It perhaps raises direct policy issues, and potential regulation involving the global giants of the digital economy. After the G7 Summit, the OECD did get agreement from 130 countries on a way forward - a minimum of 15% corporation tax.

However, Chancellor Rishi Sunak is reportedly exploring exemptions for City firms - but here, at least, G7 leaders are likely to agree that this could be the start of a new era of fiscal cooperation.

'Resilience' is a key word, and moves well beyond preparedness for another pandemic, to economic and political policy.

(Cont.)

While there was acceptance that the G7 Summit had to do much more to support the decarbonisation of developing countries, there was little detail on how the leveraging of public and private financing of a 'green industrial revolution' would work.

A clear example of failure was to promise of only a billion vaccines, against a pledge to vaccinate the world by the end of 2022 – requiring another 10 billion vaccines to give all people over 18 two doses! At the time of writing, there have been more vaccines given in Britain than across the whole of Africa.



GEOPOLITICS IN FOCUS

Geopolitical threats also featured highly on the agenda. Specific priorities which were debated include:

- Calling out the concerning build-up of Russian troops on Ukraine's border
- Agreeing tough, further measures on Myanmar if the military refuses to change course
- Committing to future support for the Afghan Government, conditional on progress on the peace process (now in further debate following the Taliban's taking of control)
- Setting out a united, balanced approach on China with the strongest condemnation yet of human rights abuses in Xinjiang, G7 commitment to tackle forced labour camps and calling out China's coercive economic practices.

From a democratic perspective, principles include:

- More action on defending media freedom around the world by local G7 diplomatic missions, backed by increased funding to the Global Media Defence Fund
- Bolstering our Rapid Response Mechanism, including through a new NATO partnership that will counter threats like vaccine disinformation
- G7 collaboration to deter the abhorrent practice of arbitrary detention, including a new Canadian-driven Action Plan.

Russia remains a key area of focus for Joe Biden, who was keen to demonstrate Western solidarity before his visit to Moscow, which he undertook straight after the G7. Relations between Moscow and Washington softened somewhat under Trump's Presidency, but a shift is likely across the coming months. As President Biden said in an informal speech to US Troops stationed at an airbase in Suffolk, "We are going to make it clear that the US is back and democracies of the world are standing together to tackle the toughest challenges and the issues that matter most to our future."



SOCIAL CARE: AN ONGOING DILEMMA

On his first day as Prime Minister, Boris Johnson committed to fix the deepening crisis in social care once and for all.

However, the anticipated plan for social care did not materialise in any substantive way in the recent Queen's speech. The dignity and security of many people who depend on a particular type of support remains unsecured.

Is the problem wholly about funding; recognising that demographics are working to exacerbate today's inadequate provision? Or do we simply not know what we want and need?

A decade ago, in the [Dilnot report](#), it was recognised that the then social care system was inadequate, unfair and unsustainable. While it can be argued that little progress was made on implementing the ten fundamental recommendations, notwithstanding financial commitments, the biggest policy gap remains the identified need for greater integration between health, social care, benefits and housing, with a specific focus on health and social care.

In the government's 2021 White Paper, [*Integration and Innovation: working together to improve health and social care for all*](#), legislative proposals for a Health and Care

Bill are clearly set out, with social care reform plans featuring actionable priorities promised by the end of this year.

However, commentators are already questioning whether the necessary radical solutions are even being considered, arguing about constraints on the country's finances. It is estimated that the Chancellor needs to find over £10 billion a year, with the Prime Minister ruling out increases in income tax, national insurance and VAT.

The Policy People wonders whether the policy of no tax rises is correct?

Professors Peter Lloyd and Michael Blakemore, for instance, raise the issue of the "three elephants" (www.peter-lloyd.co.uk):

- Who pays?
- What do we want?
- How do we deal with dementia?

The problems are not unique to the UK, and Lloyd and Blakemore make a cogent argument to support the 2021 Australian Royal Commission's approach which "... abandons one-off fixes in favour of a revolutionary approach."



WATCH THIS SPACE...

Climate report - will our governments wake up now?

The UN's Intergovernmental Panel on Climate Change (IPCC) recently published its Sixth Assessment Report (AR6), Climate Change 2021 (www.ipcc.ch). It provides an updated warning about the speed and scale of global warming - achieving a 1.5 degree centigrade increase within 20 years.

Human rights, safety and security

Recent events in Afghanistan has created an urgent need for action, if lives and human rights are to be protected. The value of military intervention over the last decade is currently being questioned, with the painful acknowledgement that many lives were lost, or have now been compromised - and for what?

Boris Johnson and Joe Biden (among other leaders) continue to defend their actions. Yet millions of Afghans will almost certainly lose the levels of freedom and opportunity which they have rightfully been enjoying. Whatever Taliban rule looks like, human rights *absolutely must* be a priority for all world leaders. On this, there can be no compromises.

Education reform: new investment and initiatives

It was on the agenda before the pandemic, and 2021 has already seen fresh financing and new initiatives in education. A £700 million investment is already focusing on an expansion of one-to-one and small group tutoring programmes, as well as supporting the development of disadvantaged children in early years settings, and summer provision for those pupils who need it the most. The soon-to-be-established Institute of Teaching will enable teachers and school leaders with training and development throughout their careers. And the new Turing Scheme, which will replace the UK's membership in the EU-wide Erasmus Plus scheme, will enable thousands of students to study and do work placements across the world.

FOLLOW US ON SUBSTACK

The Policy People is publishing daily on Substack. Subscribe for free at www.thepolicypeople.substack.com to receive daily Policy Points directly into your Inbox. From politics, economy and technology through to social issues and the environment, our short bulletins cover all of the key issues of today and tomorrow.



Policy Points Dashboard



India's summers are turning up the heat on the climate change agenda...

...but is it already too late for many countries?

The Policy People 1 0 0 ...

New Top What is Policy Points?



Leaving the Forces: what's next for our servicemen and women?

Why the government could be doing more to...

The Policy People
Aug 12 1 0 0 ...



Levelling Up: where's the action behind the ambition?

The much-used slogan "levelling up", seems to have different interpretations, especially in a metaphoric vein introduced after Brexit...

The Policy People
Aug 11 1 0 0 ...



Human trafficking: why a more joined effort is needed now

Human trafficking, or modern slavery, describes...

Show the bookmarks in this folder Dashboard

About People Edit

POLICY POINTS - the short, simple, streamlined way to access The Policy People



Great news! Daily POLICY POINTS are completely free. This is [The Policy People's](#) in-brief commentary on the subjects that really matter to us, to you, and to the wider economy. You can read our regular posts to get an overview of 'the policy world', as we like to call it. You can also [subscribe](#) to [SENTENTIA](#) - our bi-monthly publication which delves into political and policy-led subjects much more deeply.

For far more detailed insights and commentary, [please subscribe](#). This will guarantee you substantive coverage of new issues, legislation, political debate and more - all of which contributes to the matters that impact you, your family and your work.

Read some of our latest Policy Points:

- [India's summers are turning up the heat on the climate change agenda...](#)
- [Leaving the Forces: what's next for our servicemen and women?](#)
- [Levelling Up: where's the action behind the ambition?](#)
- [Audits: continuing low marks for quality](#)



CONNECT

*For regular updates
directly to your Inbox.*

LET'S TALK...

*Contact us for further discussion, or to
advertise or contribute:*

John (john@thepolicypeople.net)

Helen (helen@thepolicypeople.net).

www.thepolicypeople.net

Find us on [LinkedIn](#) & [Twitter](#)

Copyright 2021 by The Policy People.

Planned coverage for our next issue:

- Challenges and issues in the Performing Arts industry
- The Global Economy
- The politics and practices of diversity
- COP 26 approaches... what can we realistically expect?

Reference materials and useful links

www.gov.uk

www.europa.eu

www.usa.gov

www.un.org

www.worldbank.org

www.eurofi.net

www.ons.gov.uk

www.statista.com

www.ukcop26.org

www.unfccc.int

www.cipd.co.uk

www.nhs.uk

www.broadbanduk.org

www.peter-lloyd.co.uk

www.ipsos.com

www.turing-scheme.org.uk

www.erasmusplus.org.uk