

UNITE FUTURES

scenario
report

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Introduction

This document sets out [four bespoke scenarios](#) developed for Unite Students that explore the future of the UK and higher education. They are stories that explore alternative future developments and outcomes and are designed to stimulate discussion within the business about the changing dynamics in the market place and what they might mean for Unite's future planning and strategic choices.

They are *not* predictions of the future. Some elements of the scenarios may happen and some may not; some actors may choose to behave in the ways that the scenarios depict, others may not. The only aspect of the scenarios that is certain is that the future will not look like any one of them. It will be a combination of some of the elements here and other elements we have not yet thought about. None of the scenarios is meant to be 'right.' Each one offers interesting, challenging and - in some places - controversial pictures of the future.

Like any story, some readers will like some parts of the scenarios more than others. Some parts will also feel more plausible than others and some outcomes will feel more preferable. It is unlikely, however, that different readers will agree on what all the best parts, the most plausible elements and the most preferable outcomes are and exploring why that might be so should help policy and strategy development. Exploring where and why these differences exist can lead to significant strategic insights about the different perspectives, aspirations and expectations that Unite's stakeholders have - and, consequently about the decisions it has to make now and in the future.

The framework - the scenario matrix - for [The Unite 2051 scenarios](#) draws on Unite's house view of the global megatrends that are reshaping the world over the next 10 years. and Ash Future's own analysis of the strategic uncertainties surrounding how those megatrends might play out. The final matrix was selected by Unite's Executive Committee in January 2021.

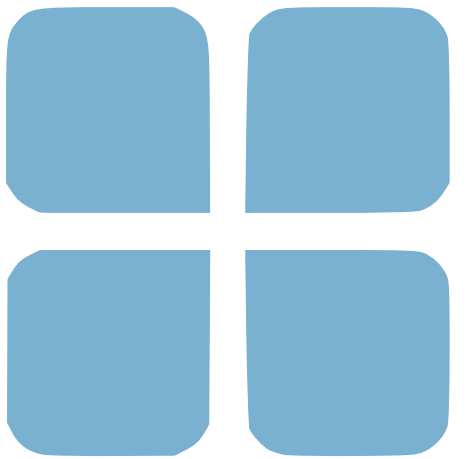
The scenario matrix explores two critical uncertainties

- Whether high value workers will be attracted by urban scale or will prefer remote working
- Whether UK competitiveness will be secured by a nimble workforce that is quick to restructure and retrain or weakened by a workforce that is slow to restructure and retrain

The uncertainty surrounding [whether high value workers will be attracted by urban scale or will prefer remote working](#) explores how nations, businesses and individuals create competitiveness - and the relationships each of these actors have with each other. At one end of the spectrum, urban environments are the principle place where wealth creators gather. Physical proximity is essential for effective working and physical infrastructure dominates investment decisions. At the other end of the spectrum, significant power rests with individuals who utilise technology to address personal or global needs.

The uncertainty surrounding [whether UK competitiveness will be secured by a nimble workforce that is quick to restructure and retrain or weakened by a workforce that is slow to restructure and retrain](#) explores how quickly the UK adapts to a rapidly changing and uncertain environment. At one end of the spectrum, the workforce is quick to change, adapting to new circumstances by learning and behavioural change. At the other end, the workforce is slow to restructure and retrain, either because of external circumstances that force it in new directions or because the workforce enjoys little or no leadership or incentives.

Combining these two uncertainties creates a scenario matrix that defines four alternative scenarios: [Urban Might](#), [Urban Plight](#), [Urban Flight](#) and [Urban Lite](#). The matrix is shown schematically on page 3 and there is an overview of the four scenarios on page 4.



About scenarios



The Unite 2051
scenarios

UNITE FUTURES

scenario report

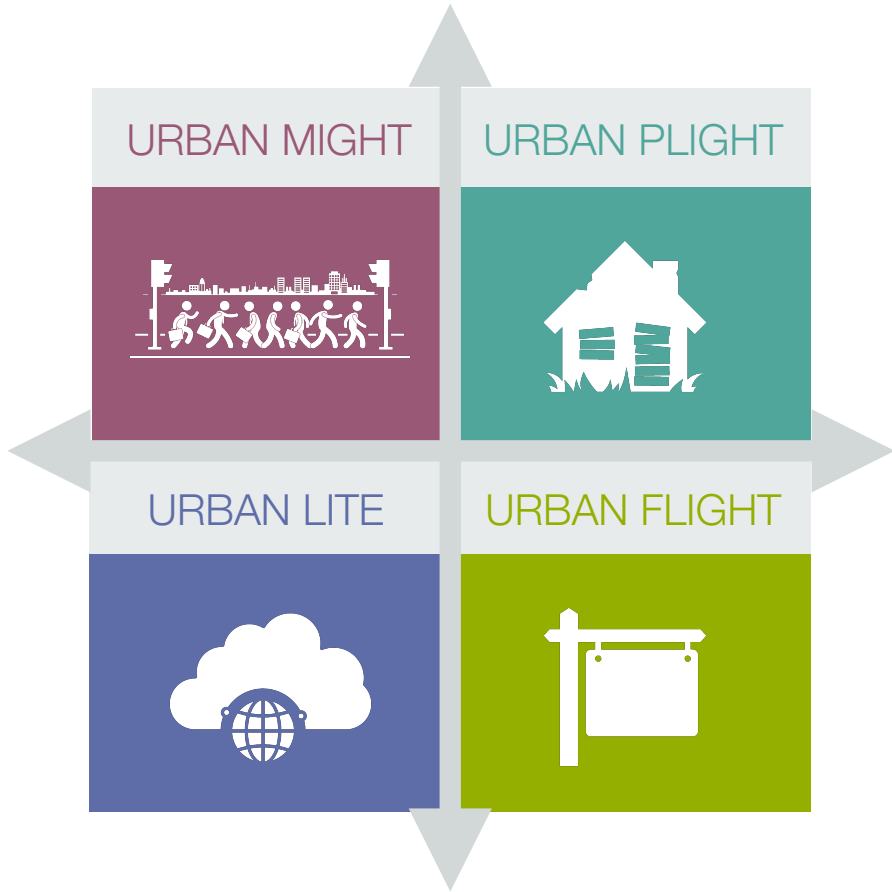
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The UK's competitiveness
is secured through a
nimble workforce quick
to restructure and retrain



Scenarios overview



Society
Social cohesion...

Technology
Technological advances...

Economy
Worldwide economies...

Environment
Focus on climate change...

Politics
UK government...

Higher education
UK universities...

URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Rises slowly as people accept the need to vaccinate and protect each other	Erodes slowly as the number of communities facing economic and environmental damage increases	Weakens as governments struggle to deal with social problems	Rises quickly. Citizens are more empowered and in control
Stay on course and are applied to development and infrastructure problems	Is unevenly deployed and reinforces social divides	Are concentrated in green technologies and energy solutions	Are widely exploited by creative knowledge workers to transform economic performance
Enter an extended recession that Europe and the US struggle recover from	Are ravaged, with entire sections of some developing countries' economies wiped out entirely	Shrink globally as some economies face near collapse following continued pandemics	Are open and connected and grow steadily
Is late and less effective than governments intend as they try to secure economic renewal	Remains on the back burner while governments struggle to repair their economies	Rises quickly and dramatically due to the threat of extreme breakdown	Is tackled early and good progress is made by strict adherence to agreed international principles
Is trusted and drives an agenda for regeneration	Withdraws from international obligations as it wrestles with the domestic challenge of rebuilding Britain	Looks to the East for guidance and leadership	Is facilitative and light touch
Are a globally strong sector at the heart of Britain's economic regeneration	Are recovering slowly after misunderstanding what their markets want	Are differentiated by subject area and deliver practical courses over a distributed network	Struggle to be relevant and to modernise their approach in line with other countries

How to navigate this report

This is an interactive document. It can be read linearly in the normal fashion or the reader can move between scenarios by clicking on any of the scenario icons that appear on each page. The icons take the reader to the first page of the relevant scenario.


Each scenario has five elements:

- the scenario overview
- the full scenario narrative
- a timeline of key events that take place in the scenario and that builds as the reader moves through the narrative
- an infographic that offers insight into how a range of metrics and attributes differ in each scenario
- a list of the principle scans from Ash Future’s horizon scanning report that have informed development of the scenario narrative. This page links to the microsite containing the full set of scans.

Each page also contains a link to the scenarios overview.



URBAN MIGHT



UK competitiveness is secured.
High value workers are attracted
by urban scale.

URBAN PLIGHT

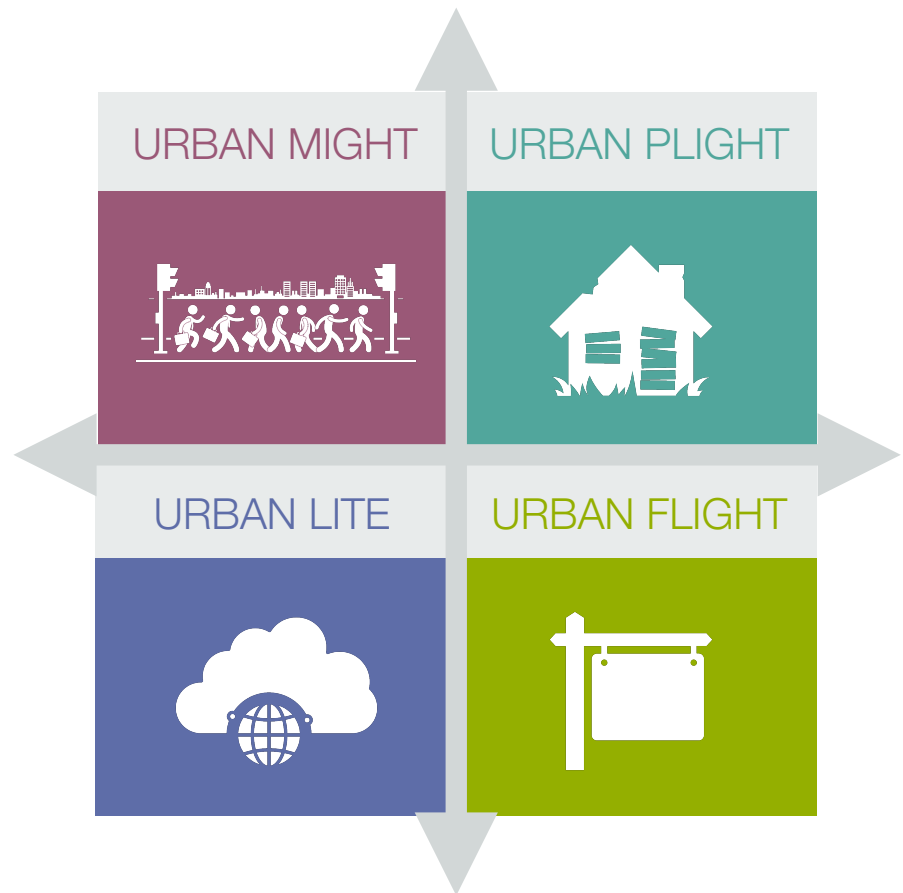


URBAN FLIGHT

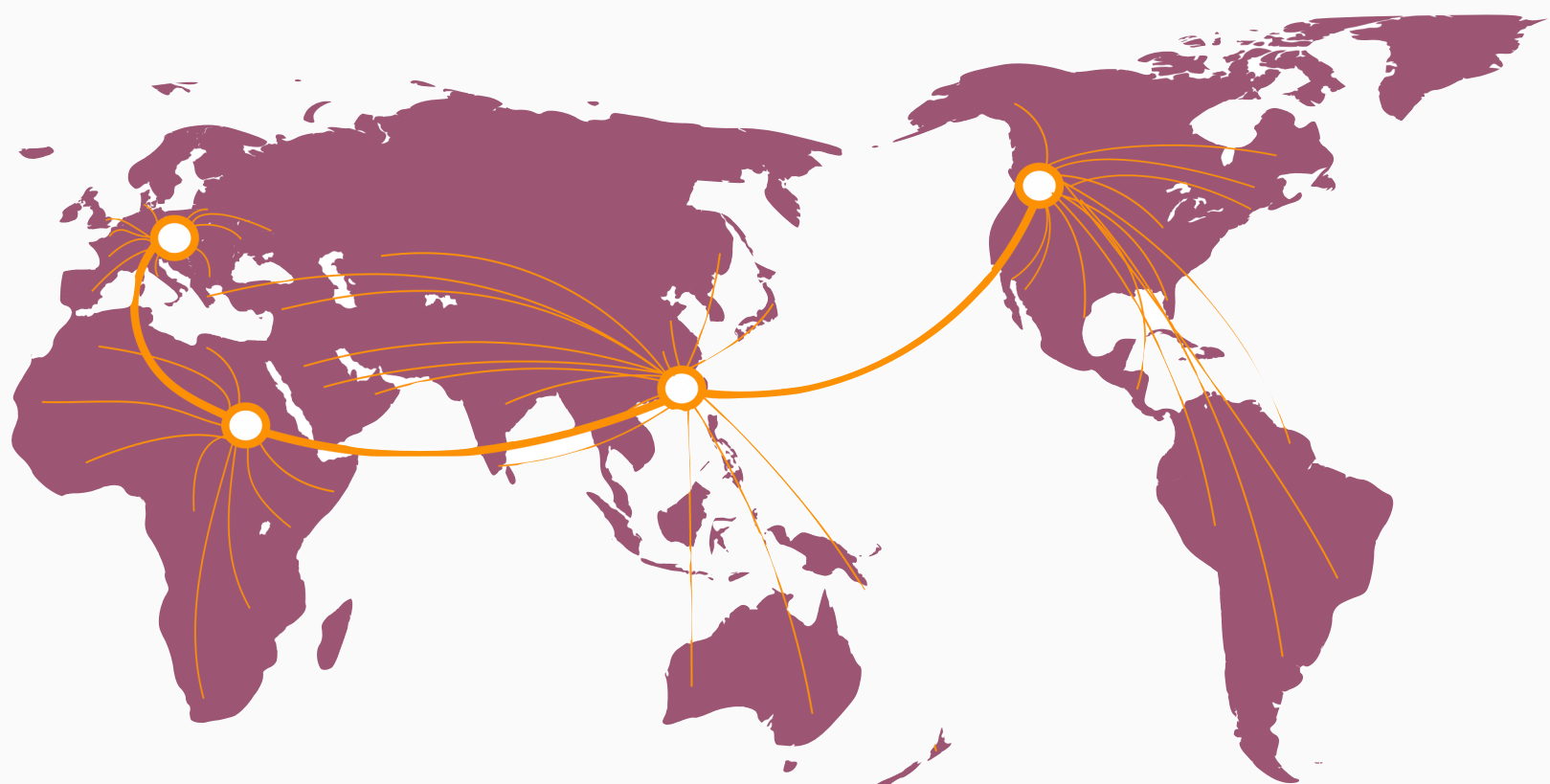


URBAN LITE





Urban Might describes a future where the UK is globally competitive and where high value workers are attracted by urban scale. UK industry is nimble and adaptable, underpinned by strong leadership and by a workforce which understands the need for continuous learning and reskilling to stay at the forefront of the global economy. Government works in partnership with industry to create the optimal market conditions and regulatory frameworks to encourage these behaviours. The world’s leading companies blend virtual and physical presence according to the competitive demands of their sectors and their customer base; the world’s leading universities are focussed on the physical learning experience. The higher education sector is smaller and focussed on strategic development; the expanded FE network conducts retraining programmes and delivers skills acceleration.



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Coronavirus pandemic is short lived

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Proof of vaccination required to return to work

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World pushed into recession

2026

STEERING BRITAIN launched

2030

Britain's skills accelerator drives economic renewal

2036

Working culture is relaxed and rooted in place

2039

MaaS rollout complete across the UK

2042

UK HE is a premium global brand

2045

Research is applied and protected

2048

Still work to do on the environment

2051

The UK is one of the world's top 10 economies



UK competitiveness is secured.
High value workers are attracted
by urban scale.



The view from 2051

It is 20 April 2051. We've been on the journey to a transformed and united Kingdom for a quarter of a century now ("25 years today is equivalent to a century in old time" as one commentator snappily put it last year) and we have a lot to show for it. Foremost, of course, is that we are one of only two western European countries in the [world's top 10 economies](#).

That success can be put down to many things but most analysts believe that event zero was UK business's early adoption of the work passport in the early 2020s.

The first versions of the passport were crude, relying on daily testing and safe working spaces and the population was sceptical at first. As the technology developed, however, so did the benefits to passport holders: secure travel, rising isolation thresholds and agent detection systems in working environments. With a population of over 78 million people now – [70 million of whom live in the cities](#) – these controls have become essential for the UK's economic success and social wellbeing and for the renaissance of our cities as centres of production.

Many people believe the cost of the UK's success has been too high, citing loss of individual freedoms in particular. A look at countries which have taken a more relaxed approach and have chosen to support citizen rights above citizen responsibilities suggests they are wrong. Those countries have mainly struggled to contain continuing rounds of infection and have consequently struggled to sustain competitiveness; or, of course, to prevent a higher than necessary death rate.

UK business's decision to act decisively and early may have been the match that started the fire but it was the workforce's willingness to adapt and to retrain that provided the accelerant. The public sector, too, has done what some thought impossible by delivering a regulatory approach that works. STEERING BRITAIN, its renewal strategy, has built on our natural talent for invention and innovation and has fanned the flames. It has also ensured that those parts of the higher education sector that can sit at the top table are able to do so.

The partnership is serving the UK well. We are tackling the three economic challenges of the age – keeping up with the competition; securing more than our fair share of the pie in the process; and re-engineering wealth distribution to maintain social stability. There is still, however, work to do on the environment. That is now pressing.

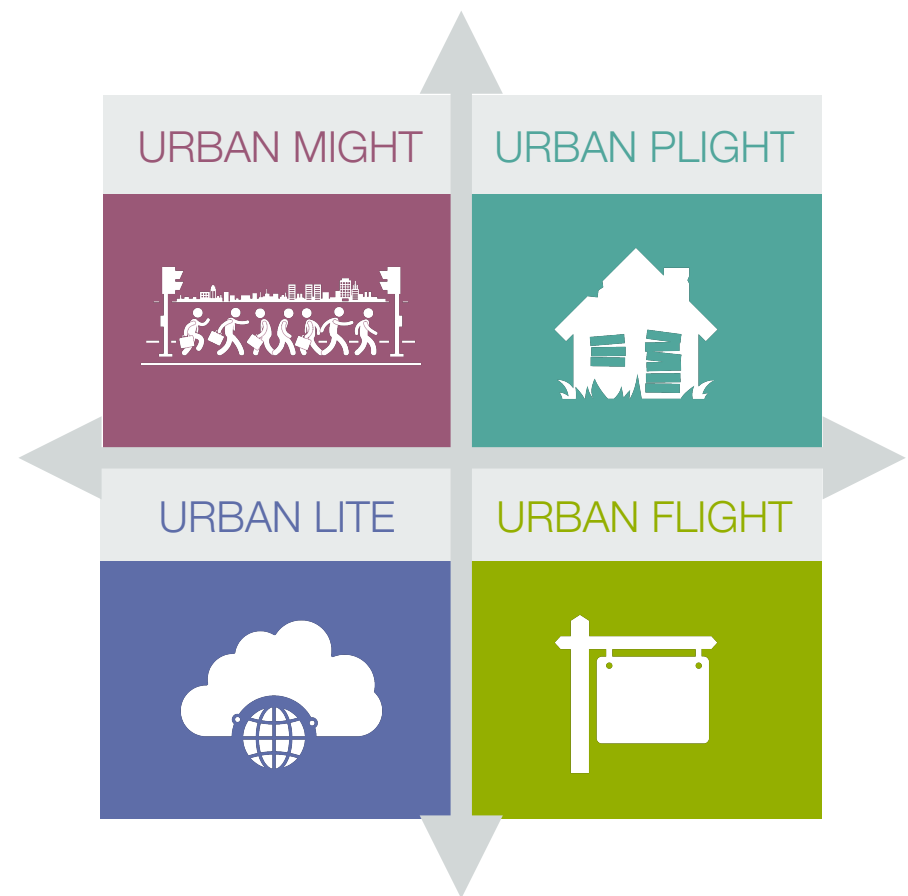
The long wave

Crises are like icebergs – it's not what you can see that creates the challenge, it's what's lurking under the surface. And what was lurking under the surface in the 2020s changed everything.

What the UK Conservative party saw when they won a landslide election in December 2019 was the chance to 'get Brexit done'. In the early days of that first full Johnstone administration, Brexit was the thing. There were other ideas on the political agenda, but Brexit – which had dominated public discourse and created confusion and division in the UK and beyond – was the big one. Nobody – anywhere – paid any attention to the report by the Wuhan Municipal Health Commission of a localised cluster of pneumonia cases in Wuhan, Hubei Province.

2020 and 2021 were dominated by coronavirus. The pandemic didn't last long, but by the time the world had it under control in 2023, three things had happened. Firstly, the world learned a very practical and meaningful lesson into what '[everyone is connected](#)' really meant in the physical domain. Secondly, the UK and other developed economies saw [a surge of appreciation for – and interest in joining – the scientific community](#); and thirdly, the [UK became a world leader in the science and business of mass health](#). This last was a fully deserved, if somewhat unintended, strategic repositioning of the UK on the global stage.

All three laid the foundations upon which the UK's resurgence has been built but the cornerstone that made everything possible was its response to the first. It's easy to forget the furore that surrounded introduction of the first [work passport](#) – society in the 20s leaned more towards rights than responsibilities – but we would not be where we are today without it. For that, we have British industry to thank.



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The UK is one of the world's top 10 economies

URBAN MIGHT

UK competitiveness is secured.
High value workers are attracted
by urban scale.

URBAN PLIGHT

URBAN FLIGHT

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New passport application

Government in the early 2020s was as much a victim of the rights versus responsibilities argument as the rest of society. It was not, therefore, particularly surprising that they fudged the issue of vaccine passports in the 2021 Gove Review, citing concerns about [ethical, equalities, privacy, legal and operational issues](#). The retail and leisure industry were disappointed and some proprietors chose to unilaterally refuse access to anyone without proof of vaccination. These were, generally, futile gestures given that there was no such thing as a vaccination certificate in the first place and that more leisure facilities didn't bother than did.

The legal position following the Gove Review was that vaccination was a personal matter and that employers had no right to insist on knowing an employee's vaccine status. That position became less tenable following the death of 35 vulnerable young adults across four supported residential units that were serviced by staff from the same care agency. None of the staff had been vaccinated and all of them were asymptotically infected with the Wandsworth SA5 variant - which they took into the homes with them. The subsequent investigation uncovered a disturbingly high percentage of staff who had lied about their vaccine status. Well off litigious children of ageing care home residents began to demand assurances about their parents' safety; homes that couldn't provide it found their residents moving out.

For a spell, it seemed that the UK might squander the early advantage it gained through its extensive vaccination programme but the market - as markets will - prevailed. Employers soon made it clear that they [wouldn't take on new staff without proof of vaccination](#) and that - after successfully pressuring government to adjust legislation - existing employees would only remain on the books on the same basis. For those in non-customer facing work, this was simply good business sense. For those in leisure and care services it was essential to remain open.

By late 2022, 98% of the working age population carried mobile phones with the [Vaxify app](#) allowing employers to spot check their status. It was time to go back to work.

STEERING the course

Those who had work to return to - 2 million fewer than before the pandemic - did so with alacrity, pleased to step away from the kitchen table after a long period of introspection, glad to be earning again after three uncertain years and grateful to be back in real spaces shared with colleagues and friends.

This was not, though, business as before. Shortlived as the pandemic was, it nevertheless pushed the world into a recession that exacerbated inequalities between and within economies. The UK was hit particularly hard with deep and [sustained job losses in tourism, retail and hospitality](#). The young and lower skilled bore the brunt, but no-one was immune; older workers in particular began to fear that their days of full employment were gone for good.

The decision by the new government of 2024 to bring UK leaders together to build a shared vision of success and find a way of working together to deliver it was a watershed moment that catalysed two decades of change.

The government began by establishing [a cross party futures group](#) which held a series of informal bilateral meetings over the course of the year to consult stakeholders about what that vision might be and how it might be delivered. The conversations were not secret, but they didn't get much news coverage either. This was a strategic decision; government spent some time talking to the press to explain what they were doing and asked for the space to let it happen. It was critical, they explained, to have the time to listen and to explore how to lead the UK forwards. The press remained skeptical but agreed.

Leading Britain Forward (LBF), the cross party, cross sector futures group that developed the vision and the plan for implementing it, was set up in early 2024 and immediately began work on the blueprint for changing the UK's future. The group divided into vision teams: Adaptation, Education, Energy, Food, Growth, Health and wellbeing, Mobility, Society and Work. Over the following year, each vision team worked across their own community to understand the issues affecting future prosperity and to develop a response.



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URBAN MIGHT



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URBAN PLIGHT



URBAN FLIGHT



URBAN LITE



The outcome of their deliberations - STEERING BRITAIN: A Strategy for Social, Technological, Economic and Environmental Renewal - launched in 2026. The strategy was operationalised by the newly formed Department for Strategic Renewal which brought together key parts of the former BEIS, GO Science and DWP. The newly appointed Head of DSR was the former Chief Executive of one of the UK's foremost AI companies and its management board was made up of industrial leaders and senior civil servants in equal measure. At the heart of the strategy were four key tasks: to establish and disburse a new social stipend; to facilitate implementation of the renewal skills accelerator; to work alongside business to develop 10 year renewal plans for each strategic sector; and to embed good environmental practice across government and business.

The Great British Brake off

Those who thought that STEERING BRITAIN was simply a token effort changed their mind once the social stipend and skills accelerator launched.

Long before the pandemic, the UK had wrestled with the social contract and how to get the unemployed back to work. Universal Credit (UC), introduced in the late 2010s was designed to make the benefit system simpler and easier to navigate (for customers) and more adaptable to policy changes in changing economic weather (for government). It was, however, born out of a different time in a world facing different risks than post pandemic Britain.

Not the least of those risks was the need to retrain the workforce quickly and appropriately and UC - a welfare mechanism rather than a development one - was not set up to do that.

The social stipend was designed to fix the first part of the problem by supporting the increasing number of people who had no expectation of ever working again. This group was primarily - but not exclusively - in their 50s and upwards and had both the wrong skills and limited facility for acquiring new ones. They came from a variety of backgrounds - long term unemployed, newly unemployed, former business owners, unskilled workers, executives - and had nowhere else to go.

Rather than try to force them into work when there was little to be found, government offered them the social stipend. At £600 per month, this was more than they received on welfare and it could be topped up by £20 per day for voluntary work. Once they signed up for the stipend, recipients were taken off the books and continued to receive it without conditions until they reached retiral age or did indeed find some other form of work.

The social stipend freed work coaches to focus on developing those who wanted to work and directing them to various channels for retraining. Those with the right foundational skills and the aptitude and appetite to learn found themselves on the skills accelerator, the strategic development channel overseen by DSR. The accelerator provided industry ready training in the strategic technologies and sectors that underpin renewal. Training was - and still is - delivered through blended day release at the national network of FE colleges, boosted by staff from former universities working closely with industry partners to meet their needs.

Pulling ahead

The UK's emerging success was not repeated everywhere. Recovery in Europe and the US, initially delayed by a combination of vaccine scarcity, political infighting and sustained concerns about civil liberties slowed through the 2020s. As countries lost ground to the UK and the east, governments also lost trust. It was a deadly combination that left Europe and the US - cumbersome, federal, culturally misaligned and uneasy with themselves - struggling to compete.

This was not simply a matter of national pride but of huge consequences globally. The recession lingered for most of the decade, deepening in those nations who were slow to protect the health of their citizens and slow to respond to the need for economic renewal. The balance of power shifted away from these actors to nimble, technologically skilled ones. New allegiances and new forms of imperialism emerged as the global economic order cracked and reformed. Adaptation and resilience were the watchwords of the newly arrived 2030s but not everyone, it seemed, received the e-mail.



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URBAN MIGHT



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URBAN PLIGHT



URBAN FLIGHT



URBAN LITE



Productivity gains

A lot of UK employers tried [hybrid working](#) in the early days post pandemic, but it quickly fell out of favour. There was a multitude of reasons why, but the two most common were that it was poorly implemented across the public sector – who treated it as non voluntary and imposed it on employees to get round social distancing rules – and it was largely unpopular with employees who found that continuous Zoom meetings couldn’t replace the personal touch and that working from a small table in the corner of their spare room was a manageable stop gap but not an acceptable long term proposition.

Public sector deployment of hybrid working lingered in some places into the late 2020s but disappeared altogether when vaccination became mandatory in 2029.

What evolved throughout the 20s and into the 30s was a relaxed workplace culture where people could come and go as they wished - 70% chose to be in the workplace for most of their allotted hours - and where the office acted as a central hub for employees to gather, collaborate, brainstorm and meet clients when they needed to.

The workplace of the 30s was no longer bound by old fashioned notions of ‘the working day’ and was (depending on function and health and safety regulations) open 24/7. Top flight offices were open plan with glass fronted meeting rooms, informal lounges, games rooms, kitchens and in house dining rooms, frequently with bars and a number of bedrooms that could be booked overnight by staff free of charge. Many commentators at the time likened them to upmarket student accommodation, even though the model drew more on the California tech co-living scene of the 2010s.

Individual offices were considerably smaller on a square metre per capita basis given that (on average) back office functions went to shared service centres that dealt with specific issues such as finance, HR, cyber security and platform optimisation. Most services were delivered by intelligent agents; human staff numbers - and consequently costs - were small.

Emerging pains

The UK in the late 2030s was performing strongly. The economy was growing as the reskilling pipeline delivered a steady flow of 21st century skills into the economy. Structurally, the UK had shifted away from an over reliance on tourism, retail and leisure and more into the development and application of technology to emerging services. UK innovators built a global reputation for developing and applying tech solutions wherever needed – whether that be elderly and social care, intelligent construction, supply blockchains or mobility. If app design really is the modern equivalent of 19th century mills, the workers are a lot happier and less exploited.

The new celebrities were scientists and technologists, brought to life by a diet of reality TV and skilfully produced documentaries that showcased the quirky, creative and rewarding working lives they lived. These were not hype, but a truthful reflection of the professions’ growing cultural and political influence. Many youngsters aspired to have one of those jobs and, since healthcare and tech have been the primary engines of growth for the last decade, there are plenty of them available.

There is, of course, a bug in the app. Or two, to be precise: the end of MaaS rollout and the planet’s continuing slow progress to address the environmental crisis.

The UK was an early adopter of [Mobility as a Service](#) and the London experience – simple, carefree and reliable travel that’s “like having a car but without the car” as the slogan put it – improved travel in the capital beyond recognition. MaaS today works so seamlessly for urban dwellers that many have forgotten what it was like in the bad old days. People have full connectivity with any destination they want, whether inside the city or between cities, and once a traveller has given the system her destination and the guidelines for travel – cost, time and willingness to wait for cheaper options, for example – the app guides her though the journey, adjusting connections and modal switching in real time if required.



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Scenarios overview

2021

Coronavirus pandemic is short lived

2023

Proof of vaccination required to return to work

2024

World pushed into recession

2026

STEERING BRITAIN launched

2030

Britain's skills accelerator drives economic renewal

2036

Working culture is relaxed and rooted in place

2039

MaaS rollout complete across the UK

2048

Still work to do on the environment

2051

The UK is one of the world's top 10 economies

URBAN MIGHT

UK competitiveness is secured.
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Despite the logistic challenges of operating in rural areas – and its less enthusiastic reception from country dwellers – MaaS is also available outside the cities. It remains a slightly different proposition since access to the electronic infrastructure doesn’t necessarily mean there’s going to be a vehicle nearby just when you need it. Even with roaming vehicles, no-one’s cracked that problem yet.

That, however, is not the big problem. The big one is that now that MaaS is in place across the UK, the significant cohort of unskilled labour that it mopped up is now out of a job. There are not enough reskilling opportunities or jobs for them and the social stipend is a less favourable option for strong, young predominantly male labourers.

For too long now, the ‘Environmental Renewal’ part of DSR’s brief has been underplayed. That this reflects the situation globally is no comfort whatsoever. Climate considerations have come third in the world’s to do list, subordinate to fixing health and wellbeing and rebuilding economies for too long. There has been limited mitigation action on a global level and too many governments declaring adaptation programmes to future-proof their own critical infrastructure and protect their populations rather than work together.

The sense of urgency for climate action is clear, but the two questions that (wrongly) dominate international discussions are “Why should we go first?” and “My Backyard? No chance.”

Higher Education

Education and skills are at the heart of the STEERING BRITAIN agenda. There are fewer universities than thirty years ago and they are more research intensive. undergraduate courses last for three years (still four in Scotland) and are taught on site. The social element is an important part of the learning process for students – and it improves the quality of teaching as well.

A university education is the first stepping stone on the path to a research career and is regarded as a serious endeavour. Drop out rates are lower, not least because of the high cost of the investment individuals and their sponsors make to get and stay there. A high proportion of students apply to industrial sponsors for funding. Research funding overall remains high relative to the number of institutions, but costs the public purse significantly less due to contraction of the sector. Industry contracts significant amounts of its own R&D to universities and is a demanding consumer. Research is more applied and protected and there is less scope for peer reviewed publication than there was. This doesn’t matter – patents, post protection publication and sustained funding are today’s measures of academic success in universities across the globe.

The UK is a premium brand. It doesn’t attract the volume of students it once did – thankfully – but it does attract the best.

The network of FE colleges that conduct the retraining programmes and deliver skills acceleration is extensive, boosted by repurposing of the old universities that dropped out the sector in the late 20s and 30s. They, too, have close ties with industry.

The close partnership between education, skills, government and business has been the key to the UK’s success over the last three decades – but there are now some concerns that its focus may be potentially damaging. The short term focus and headlong rush to repurpose the skills base has successfully delivered the skills the UK needs to be competitive today – but it has also resulted in a short termist approach that means important long term issues like environmental renewal stay on the back burner.



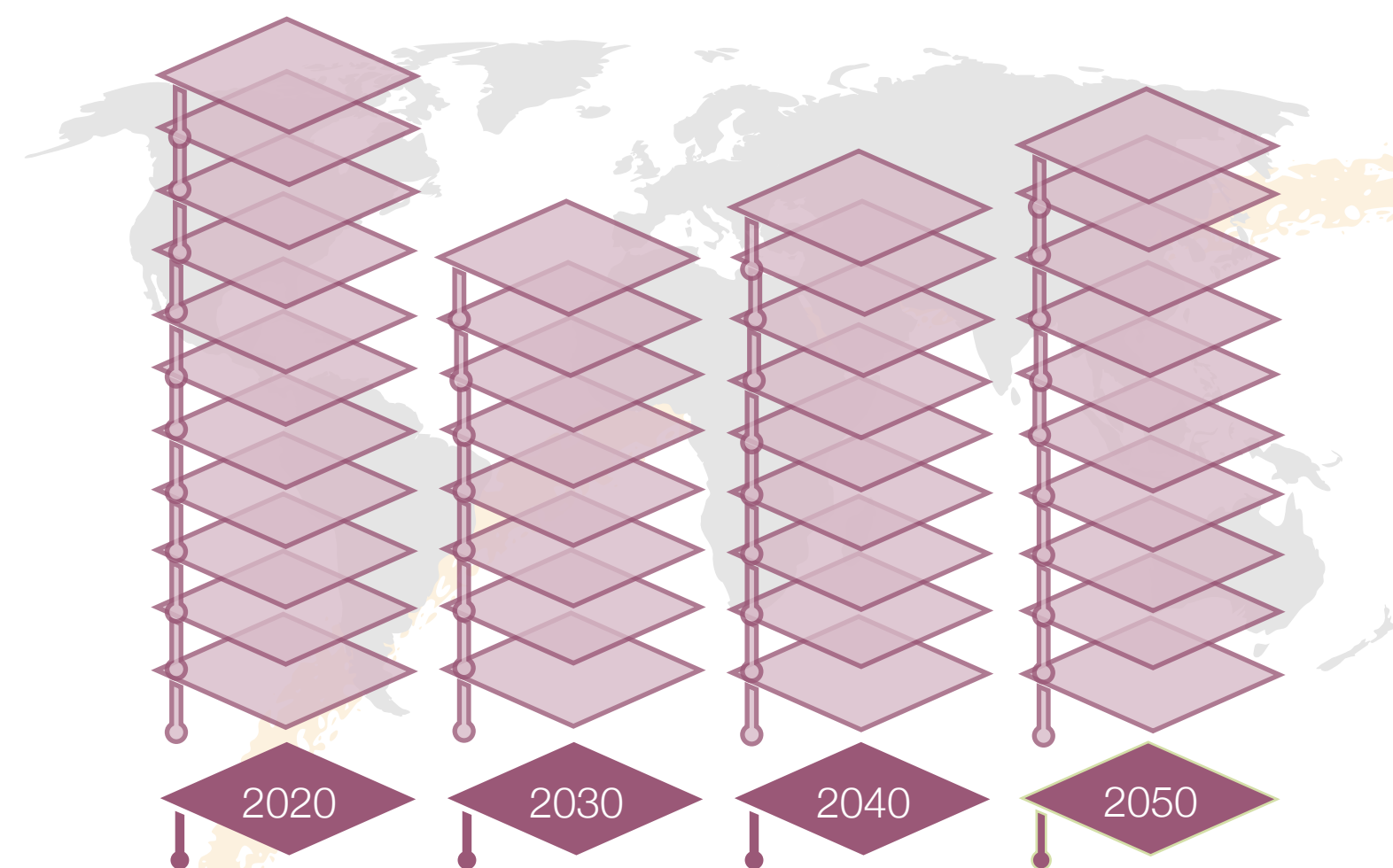
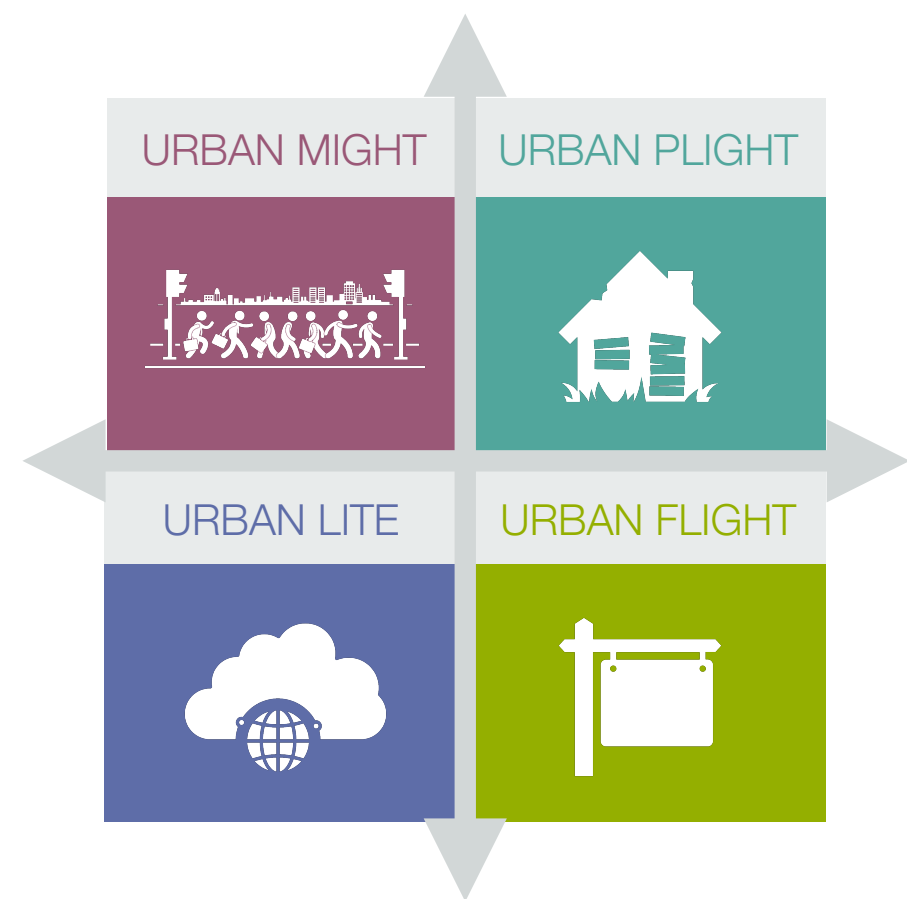
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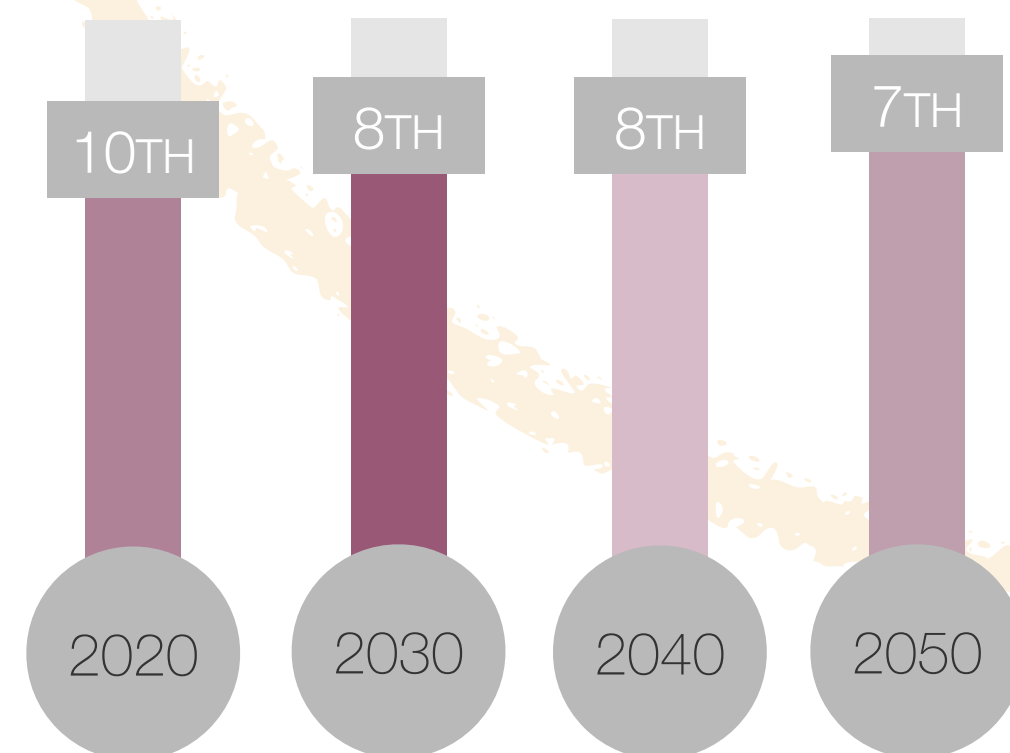
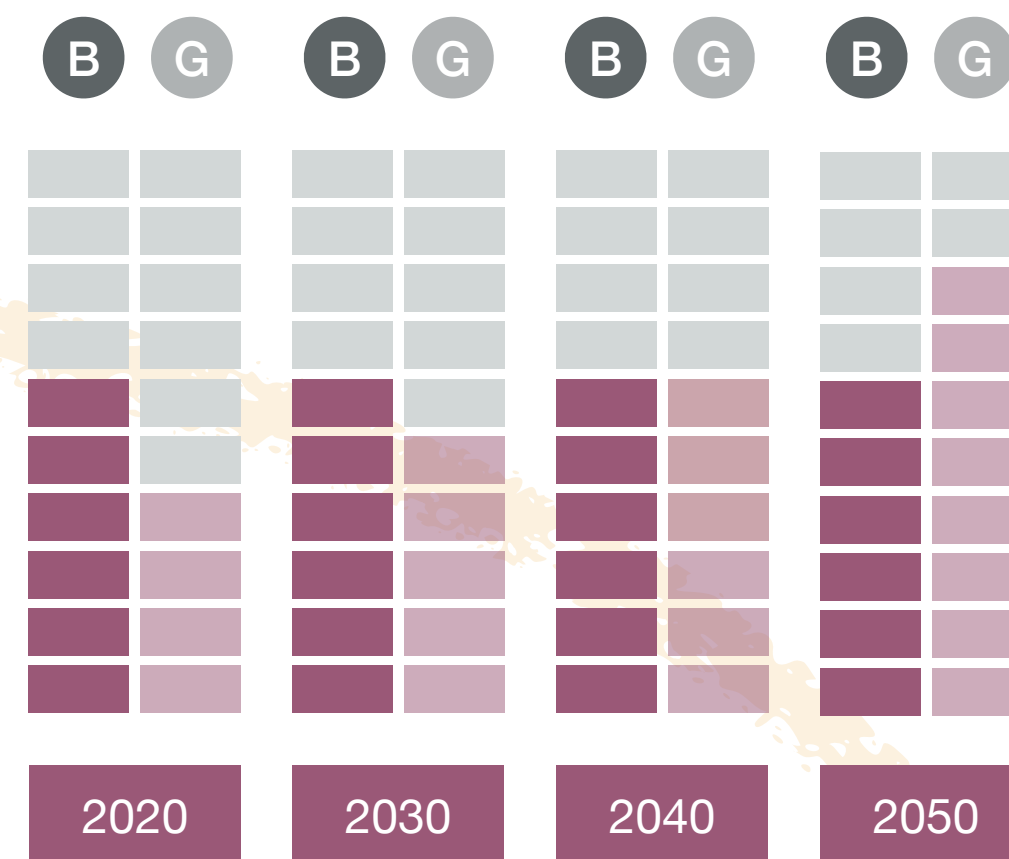
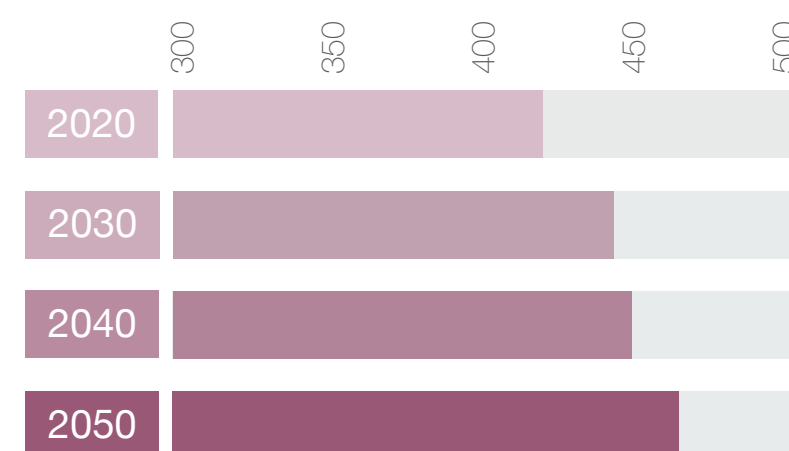
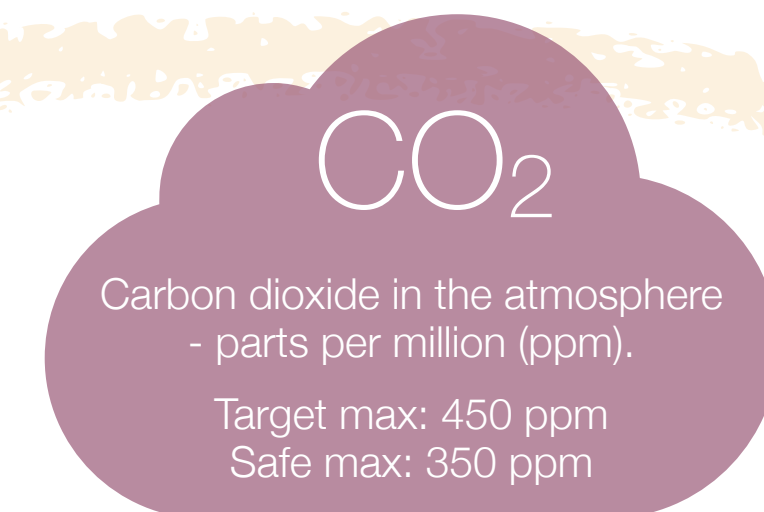
URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
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Scenarios overview

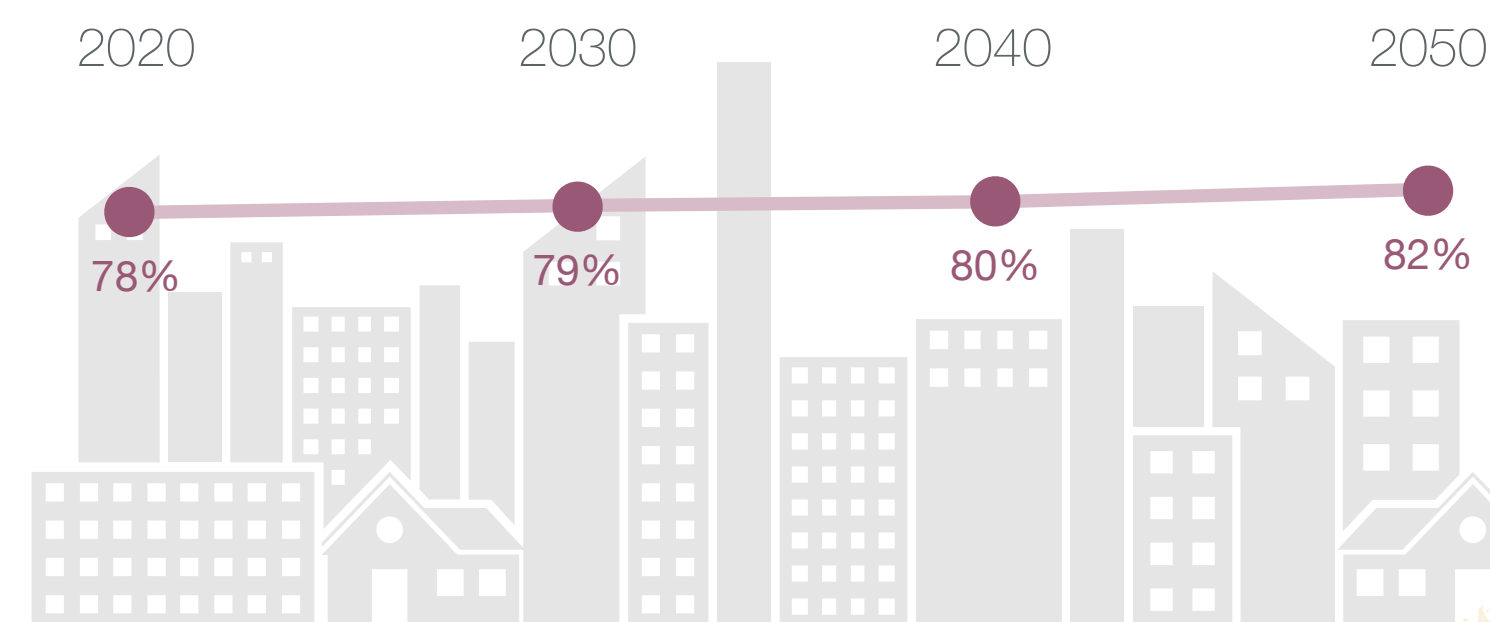
2021	2023	2024	2026	2030	2036	2039	2042	2045	2048	2051
Coronavirus pandemic is short lived	Proof of vaccination required to return to work	World pushed into recession	STEERING BRITAIN launched	Britain's skills accelerator drives economic renewal	Working culture is relaxed and rooted in place	MaaS rollout complete across the UK	UK HE is a premium global brand	Research is applied and protected	Still work to do on the environment	The UK is one of the world's top 10 economies



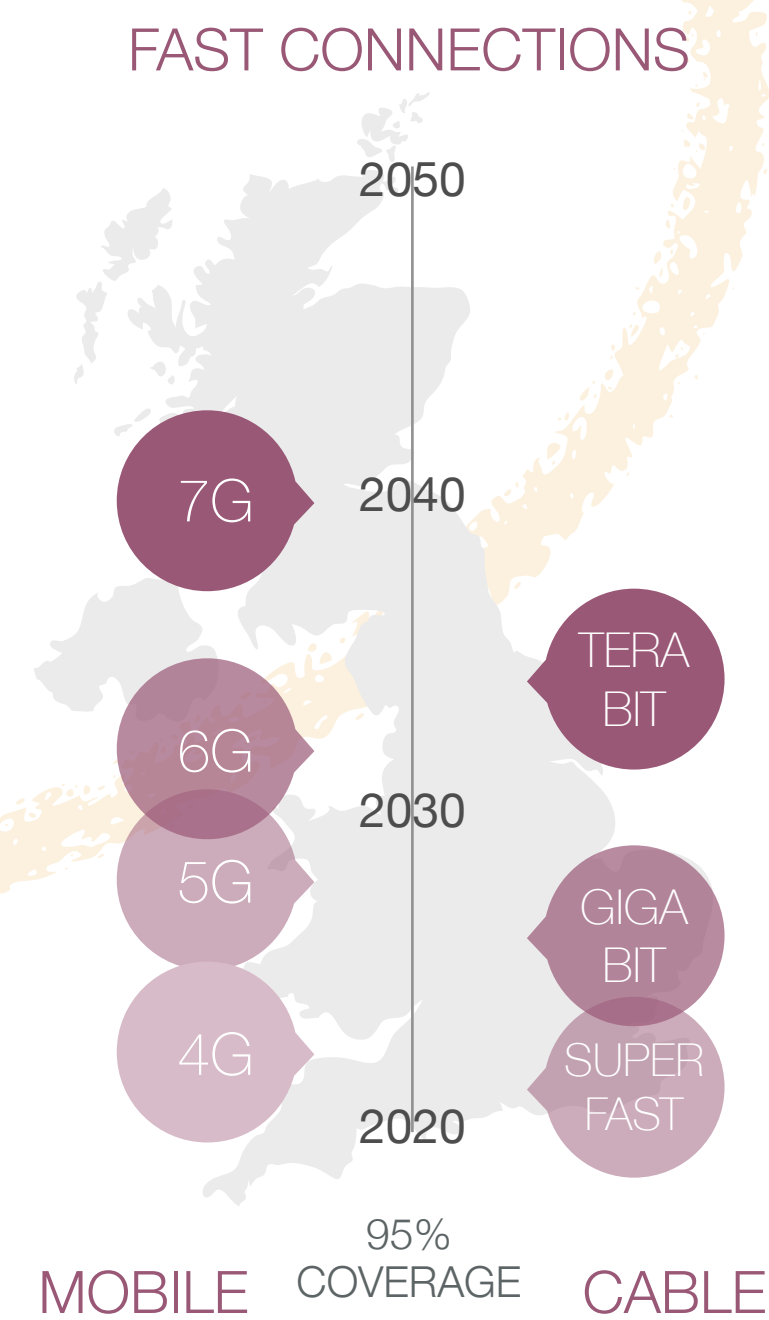
UK UNIVERSITIES IN GLOBAL TOP 100



GLOBAL INNOVATION RANKING - UK



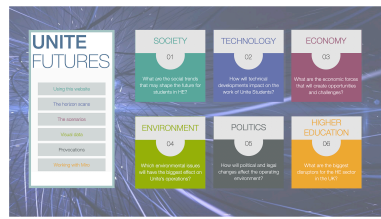
FTSE 350 STAFF WORKING IN CITY CENTRE OFFICES



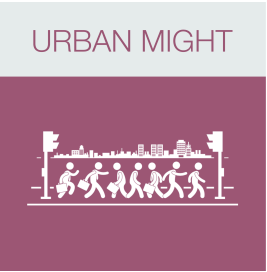
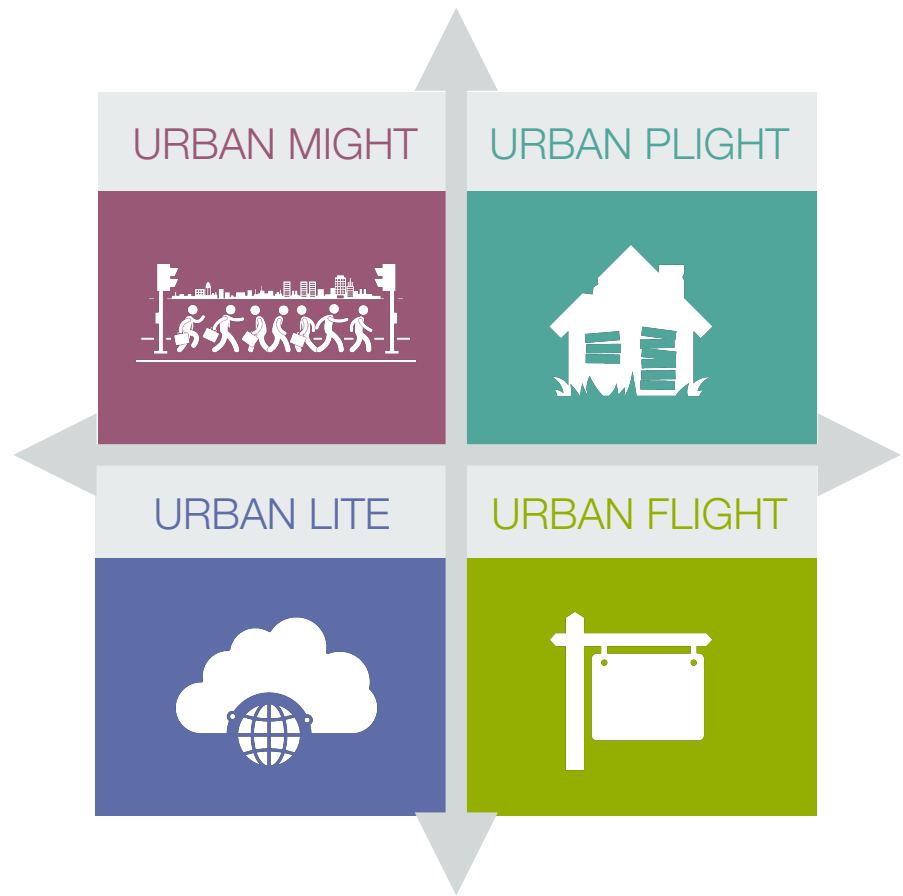
MOBILE COVERAGE CABLE

URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
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Scenarios overview



Scanning microsite



UK competitiveness is secured.
High value workers are attracted
by urban scale.



MENTAL HEALTH More of us, including students, are experiencing mental health issues, especially during Covid.	MOBILITY AS A SERVICE The integration of various modes of transport along with information and payment functions into a single mobility service	JOB'S OF TOMORROW New jobs will require constant retraining and are likely to require a mix of technical and soft skills.	NEAR THE PEAK There are finite resources on the planet. Some key minerals are reaching their peak and will be in short supply.	EMPOWERING SCIENTISTS The Advanced Research and Invention Agency will empower leading scientists to identify groundbreaking research	RULE BRITANNIA The UK is likely to remain one of the top international destinations for graduate education	CLOSURES...? Some existing universities should be closed down and new ones be established to save the HE sector
CO-LIVING How will people choose to live together? Is co-living a flash in the pan or here to stay?	THE AI SKILLS GAP New research by Microsoft reveals that the UK has lower AI maturity, adoption levels and workforce skills than its competitors	THE 'C' FACTOR The economy post Covid will bring new challenges and accelerate existing trends.	WILLINGNESS TO PAY Do people's behaviour's match their intentions - especially regarding environmental issues.	LEVELLING UP R&D The UK R&D Place Strategy will set out how Government will invest research and innovation in places around the UK	HE'S ROLE IN RECOVERY The HE sector could play a role in recovery post Covid.	ALTERNATIVE CREDENTIALS The key to making higher education reach non-traditional groups who need to up-skill or reskill
UNEQUAL WORLD Inequality is rising sharply across the world - with major impacts for the poor as well as for society at large.	RESEARCH CULTURE More people want to do research - but the culture needs to improve	GET BACK TO WORK The need for socialisation and collaboration will drive people back to the office. But will it look the same?	ORIGIN OF THE SPECIES Loss of biodiversity is seen as a crisis on a par with the climate crisis. Losing key species could have major impacts.		TOO MANY GRADUATES 42% of the core skills required to perform existing jobs will have changed by 2022	LIFELONG LEARNING AHEAD Meeting the challenge of re-skilling and upskilling a nation
DIVIDED WE FALL Addressing patterns of discrimination will have benefits to individuals and society.		CIRCLE THE WAGONS Protectionist policies are on the rise - and the UK is particularly vulnerable. Covid has added to those tendencies.			NAVIGATING CHANGE Universities need to think carefully about how to adapt to a digital learning environment	

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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Key skills in demand The need to continue and progress skills	Key skills in demand The need to continue and progress skills	Key skills in demand The need to continue and progress skills	Key skills in demand The need to continue and progress skills
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Scenarios overview

2021 Coronavirus pandemic is short lived	2023 Proof of vaccination required to return to work	2024 World pushed into recession	2026 STEERING BRITAIN launched	2030 Britain's skills accelerator drives economic renewal	2036 Working culture is relaxed and rooted in place	2039 MaaS rollout complete across the UK	2042 UK HE is a premium global brand	2045 Research is applied and protected	2048 Still work to do on the environment	2051 The UK is one of the world's top 10 economies
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URBAN MIGHT

URBAN PLIGHT

UK competitiveness is weakened.
High value workers are attracted
by urban scale

URBAN FLIGHT

URBAN LITE



Urban Plight describes a future where the UK is globally uncompetitive and where high value workers are attracted by urban scale. The UK has suffered a long decline, brought on by the perfect storm of an ageing population, worsening environmental degradation and a legacy infrastructure in urgent need of upgrading. People have moved into the cities looking for work, care and access to services. Government, in command and control mode and with limited options, has focussed on the regeneration of strategic cities. These are now the focus for everything - intervention, resources, population, successful universities - but the scale of the task facing government is massive. The higher education sector has been consolidated to reflect regional requirements and is focussed on local need. Public services outside the strategic cities have limited money and little scope to make a difference and many communities are severely blighted by drug use and related crime. Trust has declined catastrophically and social cohesion is under threat.



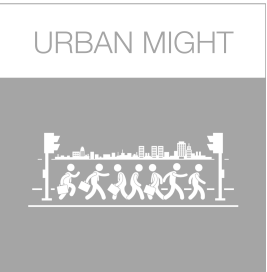
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly competitive cities The world's most innovative and productive cities	Highly competitive cities The world's most innovative and productive cities	Highly competitive cities The world's most innovative and productive cities	Highly competitive cities The world's most innovative and productive cities
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Scenarios overview

2021	2024	2027	2031	2033	2036	2041	2044	2046	2048	2051
LDCs an accelerator for SARS-CoV-2	20% of world population goes hungry	Spiralling private and public debt in the UK	Business futures tax, personal ownership tax introduced	Government launches its Regeneration Plan	Creation of 9 megacity clusters	Relocation and rebalancing of the population	HE sector consolidates around megacities	Increase in non residential skills based microcredentials	Trust in government at an all time low	UK Government relocates to the regions



UK competitiveness is weakened.
High value workers are attracted
by urban scale

Other governments had no such qualms, even perhaps welcoming the opportunity. China - and some other East Asian countries - took an authoritarian approach using track and trace and enforced house quarantine to control the spread of infection. Some of this was – of course – about public health and safety but the Chinese government’s actions were mainly designed to put digital technology at the heart of social control. From mass surveillance, tracking intelligence, and internet censorship to the use of social credit systems, augmented data-collection capabilities, and big data, China’s new normal expanded its move against civil liberties.

Losing balance

By the mid 2020s, the global economy was (to quote the World Economic Forum) “ravaged, with entire sections of some developing countries’ economies wiped out entirely.”

The G20 raided their piggy banks, pumping out money to support businesses, to bolster global markets and to boost national social security programmes. These measures initially provided a lifeline for the millions of small business owners forced to close their doors and the many millions of workers laid-off across the economy, from the retail and leisure to the automotive and transport sectors.

The G20s citizens were gently protected. It was easy for those in work to convince themselves that things weren’t so bad; and even those who’d lost their job were still able to take their social security cheques to a local supermarket fully stocked with affordable food.

It was not the same in the LDCs. Oil prices plummeted, currencies appreciated, export and foreign investment competitiveness fell, tourism all but stopped and economies were left completely destabilised and scrambling for survival. The chronically hungry, already numbering 700 million before 2021, reached 1 billion during 2022 and 1.5 billion by 2024. In its first year alone, the pandemic erased two decades of progress in poverty reduction.

The G20’s fight over whose responsibility it was to support these failing economies is now regarded as something of a watershed in geopolitics. At the 2025 summit, Japan, South Korea, India, and China pledged to double their development aid for one year if other members would follow with at least a 10% uplift.

Many did; and the resulting \$250 billion of special humanitarian aid was put to work over the following decade to improve infrastructure and communications technology, to build better roads, to increase access to cell phones for nearly 30 million rural residents, enabling them to bolster their income by accessing information on crop prices and weather forecasts and to strengthen the overall health infrastructure.

One notable exception to the countries that pledged additional aid was the UK.

Close to the edge

Britain’s unwillingness to pay was not a decision it made lightly, but it had little choice. The domestic situation in the late 2020s was not good. Furlough had been phased out, creditors were demanding that debts be paid, company closures and unemployment were at an all time high. A decade of winter storms and flooding had inflicted significant and sustained damage to communities and infrastructure. Public services were at breaking point. Making more payments to help others when so many people at home were in trouble would have been political suicide.

The run up to the 2029 election was a period of spiralling public and personal debt. As furlough ended, the number of unemployed seeking help broke the JobCentre servers. Most of the newly unemployed had always worked, had never had to claim benefits and had no idea of their route back into work.

Emotions ran high; people were ashamed to find themselves unemployed, angry at the injustice and the failure of the system to get them back to work quickly, offended that the government seemed to be ‘checking up on them’ and outraged at the quality of work that was on offer. Some dealt with the situation badly; some coped better, retaining the hope that things would return to normal soon. None of them had any idea how to manage on £400 a month. Most of them didn’t.



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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High value workers are attracted to urban scale	UK competitiveness is weakened	High value workers are attracted to urban scale	UK competitiveness is weakened
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Scenarios overview

2021

LDCs an accelerator for SARS-CoV-2

2024

20% of world population goes hungry

2027

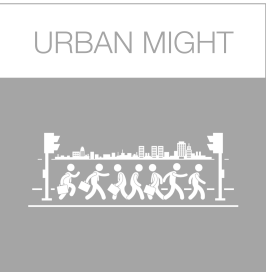
Spiralling private and public debt in the UK

2048

Trust in government at an all time low

2051

UK Government relocates to the regions



UK competitiveness is weakened.
High value workers are attracted
by urban scale

The Department of Work and Pensions (DWP as it was known at that time) was set up to fail. Swamped by numbers and with few opportunities to get people into work, government initially introduced its new StartBack scheme to provide training and employment experience to the under 40s and provide a soft route back to work. Participants were given up to two 6 month work placements at the minimum wage - paid for by the government – in the hope that employers would take them on full time at the end.

The scheme was good for employers – who got free labour for 6 months – but not so good for trainees. They quickly discovered that employers preferred to let them go after 6 months and get another freebie from the vast labour pool; and that the training on offer was designed for low skill levels that were cheap but increasingly irrelevant.

People felt trapped, whether in work or out of it. Stress levels rose. Then divorce rates. When the government introduced its business futures tax in 2030 – taxing businesses on what their turnover was projected to be in the coming financial year - and its personal ownership tax in 2031 – taxing individuals for luxury goods they already owned and had already paid for (cars, homes, computers, for example) - suicide rates went up as well.

Eroding communities

The storms that battered the UK throughout the 2020s inflicted significant and [sustained damage on communities and infrastructure](#).

Most of those communities were outside the main urban areas and some received government support - but many more did not. Those living in areas of particular risk began to feel like the responsibility for taking action was down to them and them alone. As concern grew that government had abdicated its responsibility, many residents began to evaluate their life choices. With hindsight, it's no surprise that net migration from cities to rural areas slowed. By 2032 it was – at less than 10,000 a year – a fraction of what it had been a decade earlier.

That might have been bad enough for rural and coastal areas trying to stay afloat (as one commentator rather unfortunately put it at the time) but these headline figures masked a challenging truth: that people were *leaving* rural and coastal towns for the cities where they believed their lives would be less blighted by the consequences of climate change.

It was generally true that the people who moved to the cities had cash in the bank and a job to go to. Those who remained – already the more disadvantaged members of their communities – were older, in poorer health, with limited income and with very few job opportunities. The metrics for social vulnerability and resilience to climate change began to align; and another vicious cycle began.

The radical road

And so, in 2033, the UK government launched its regeneration plan, setting out its fifty year vision of the UK and roadmapping how it would use new technology and fiscal incentives to – literally – move Britain into pole position to return to global authority by the end of the century.

The strategy was a long time in gestation as local and national government worked together to take a long term view of the future of the UK's cities. The plan was (and still is) ambitious, costly - and absolutely necessary. 30 years ago, it would have been hugely controversial and would probably never have been passed but Britain in the early 2030s was close to collapse and needed a radical road out.

At the heart of the plan is the creation of 9 megacity clusters based in North Scotland (Aberdeen and surrounding areas) Central Scotland (the Glasgow Edinburgh axis), Northern Ireland, the North East (Newcastle), the North West (the Manchester Sheffield Bradford Leeds group) the Centre (Birmingham Coventry Leicester) the South East (the London cluster), Wales (Cardiff and Swansea) and the South West (Bristol).



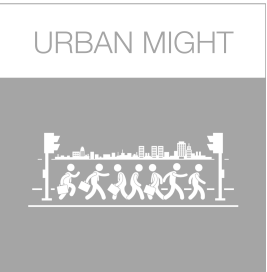
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly resilient, with a strong focus on sustainability and green infrastructure. The UK is a global leader in innovation and digital infrastructure.	Resilient, with a focus on sustainability and green infrastructure. The UK is a global leader in innovation and digital infrastructure.	Resilient, with a focus on sustainability and green infrastructure. The UK is a global leader in innovation and digital infrastructure.	Resilient, with a focus on sustainability and green infrastructure. The UK is a global leader in innovation and digital infrastructure.
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Scenarios overview

2021	2024	2027	2031	2033	2036	2048	2051
LDCs an accelerator for SARS-CoV-2	20% of world population goes hungry	Spiralling private and public debt in the UK	Business futures tax, personal ownership tax introduced	Government launches its Regeneration Plan	Creation of 9 megacity clusters	Trust in government at an all time low	UK Government relocates to the regions



UK competitiveness is weakened.
High value workers are attracted
by urban scale

Each megacity acted as the focus for regional development. Phase 1 concentrated on building the housing required to accommodate the population. Government guidance demanded intelligent re-development within cities before new housing be added to city edges and beyond. Planning rules were changed to ensure that all developments were mixed use; environmental impact – energy use, supply chain carbon cost and 25 year emission profile - was the first question asked by planners and developers.

In phase 2, still under way, government is offering incentives – jobs, training, education and housing – to encourage relocation and rebalancing of the population. This, of course, is what has accelerated the relocation of the civil service. Those employees face Hobsons choice - move, or step aside - but the indications are that significant numbers of the professions currently in London and the South East are willing to relocate. This is a positive step towards the aim of reducing population in the London cluster by 15% by the end of the century.

Phase 3 will see intracluster transportation services strengthened to minimise car ownership. The plan is that citizens will enjoy safe and easy access to jobs, shopping, leisure facilities and services by public transport, walking, and cycling. Car ownership will not be banned but the aspiration is that megacity clusters will provide alternatives so that people no longer feel the need to own a car. That is already happening; increasingly, vehicles are owned by private or public providers and used on a pay as you go basis.

Digital bridges, spatial divides

The final phase - inter cluster mobility or ICM - is lagging somewhat. Government remains somewhat blasé about the fact that Britain's shiny new cities still rely on old rolling stock, inconsistent infrastructure and unreliable and old tech based services for the movement of goods and people between them. And today, in 2051, different parts of the UK network managed by different organisations still seem to have trouble communicating with each other. It could be another decade or more before this is fixed.

The focus of the plan to date has been the reorganization of UK population and its economic geography. That has been undoubtedly stellar work but it is that focus - on places, not on people - that has created the social challenges the UK now faces.

Foremost is the concern that the megacities will be magnets for funding that will pull everything away from the rest of UK. Second is that they will be magnets for young people and that the interstitial cities will prove to be nothing but feeder towns. Third is that they will grow too big and ultimately destroy what was distinctive and loved about local communities.

Higher education

Demand is rising slowly after a difficult few years. The sector began to decline in the late 2020s, partly as a result of muddled messaging about whether it was better to go to a physical campus or to learn online, partly due to the fall in international student numbers and partly because the public purse strings got tighter. And tighter.

A number of institutions did real harm to their own reputations and to the sector as a whole by focussing more on revenue than on investment in new learning channels and processes. They were slow to recognise a cultural shift in what the student body wanted from the university experience: education first, service quality second, blend-it-yourself flexibility third and the lived experience fourth. Of course - as many universities argued at the time - this preference list was somewhat simplistic for the sector as a whole; but it was essential for individual institutions to recognise what their own customer base wanted and where their competitive advantage lay.

The parlous state of UK finances in the early 2030s meant that government simply could no longer shore up the sector as a whole. This, combined with the demographic dip of that decade pushed some institutions close to the edge. The rise in degrees taught in English in China, Taiwan and elsewhere pushed them over.



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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Phase 1: Create a megacity cluster. The goal is to create a megacity cluster of 10 million people by 2051.	Phase 1: Create a megacity cluster. The goal is to create a megacity cluster of 10 million people by 2051.	Phase 1: Create a megacity cluster. The goal is to create a megacity cluster of 10 million people by 2051.	Phase 1: Create a megacity cluster. The goal is to create a megacity cluster of 10 million people by 2051.
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URBAN MIGHT

URBAN PLIGHT

UK competitiveness is weakened.
High value workers are attracted
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URBAN FLIGHT

URBAN LITE

The sector’s consolidation was it saving grace. The process began in the mid 2030s as a response to the changing market conditions and ended a decade later as part of the government’s regeneration plan. Today, each megacity has one large university - often with different campuses - which offers the lived student experience. Courses last for 60 weeks run over two years, are wholly funded by the student and are competitive to get in to. They are also focussed on subjects of strategic importance - STEM, medicine, law, wellbeing, for example - and conduct research as required by local regeneration need (a condition of centralised funding).

Some of the former Russell Group universities live on outside the megacities. For some - Oxford, Cambridge, St Andrews, for instance - that is a positive blessing. For others, such as Aberystwyth, Brighton and Canterbury, it feels more like a matter of time before their numbers become unsustainable.



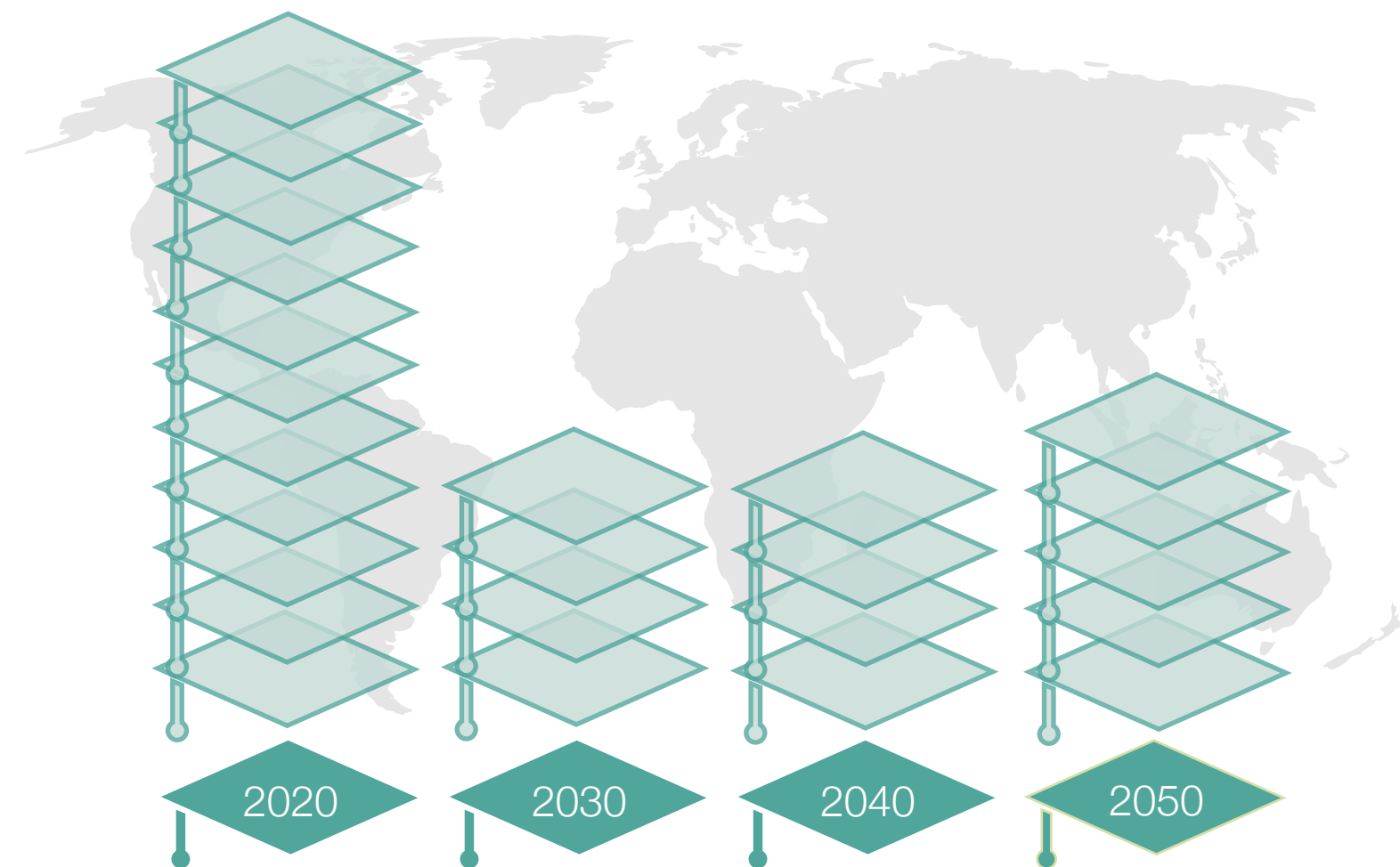
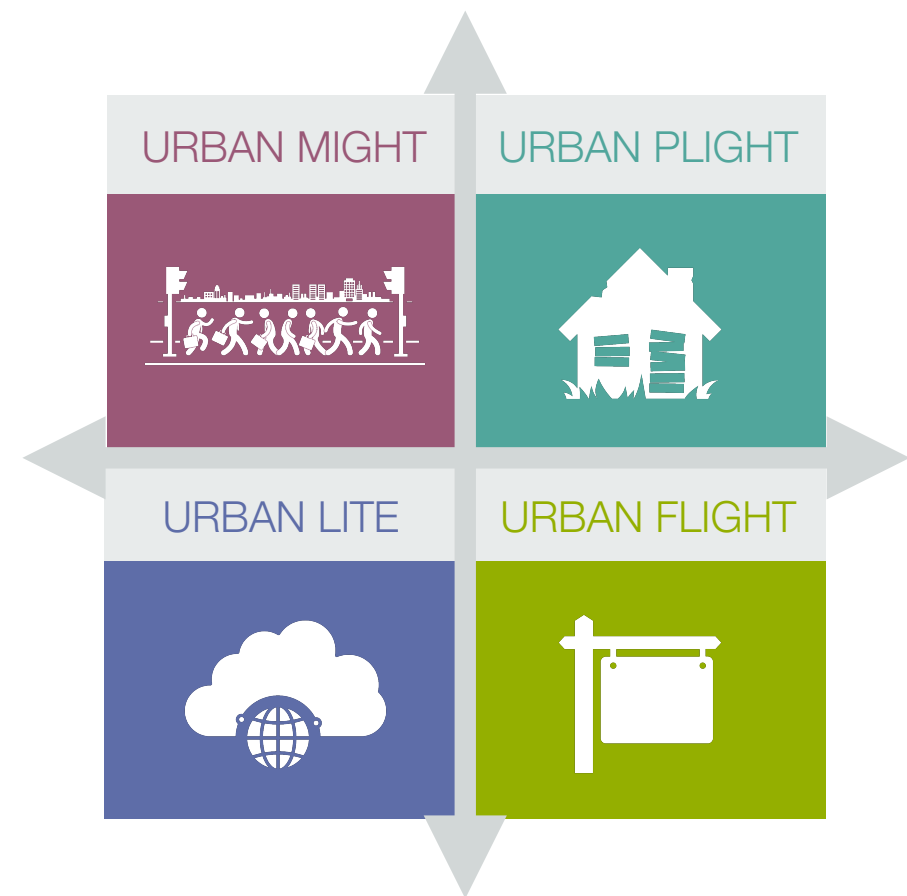
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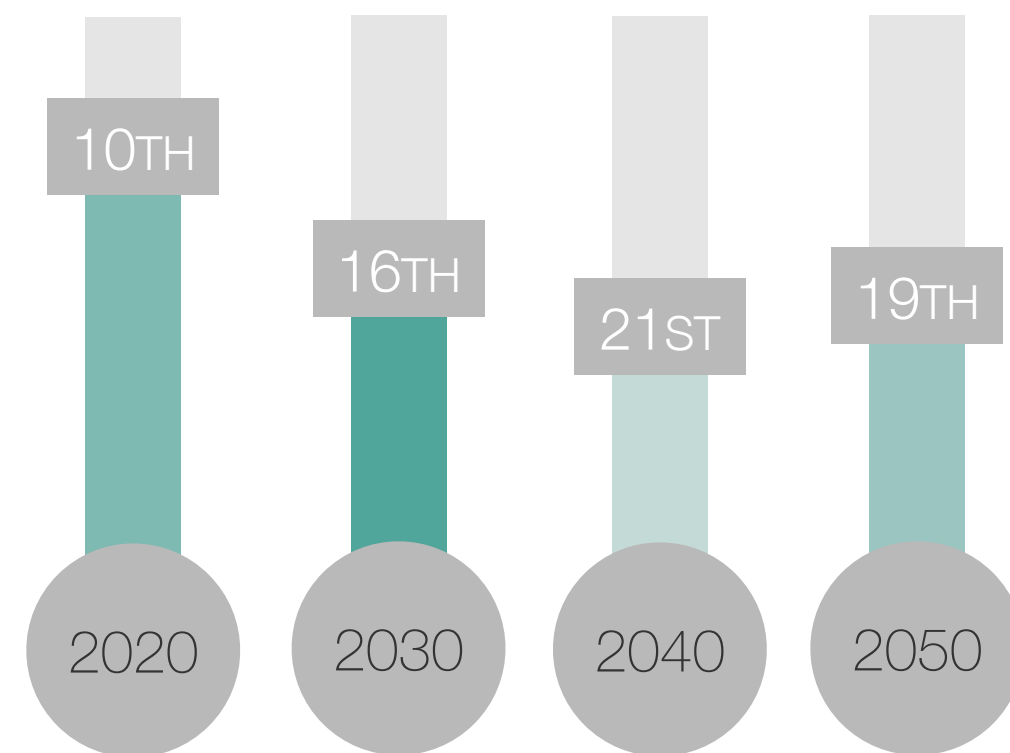
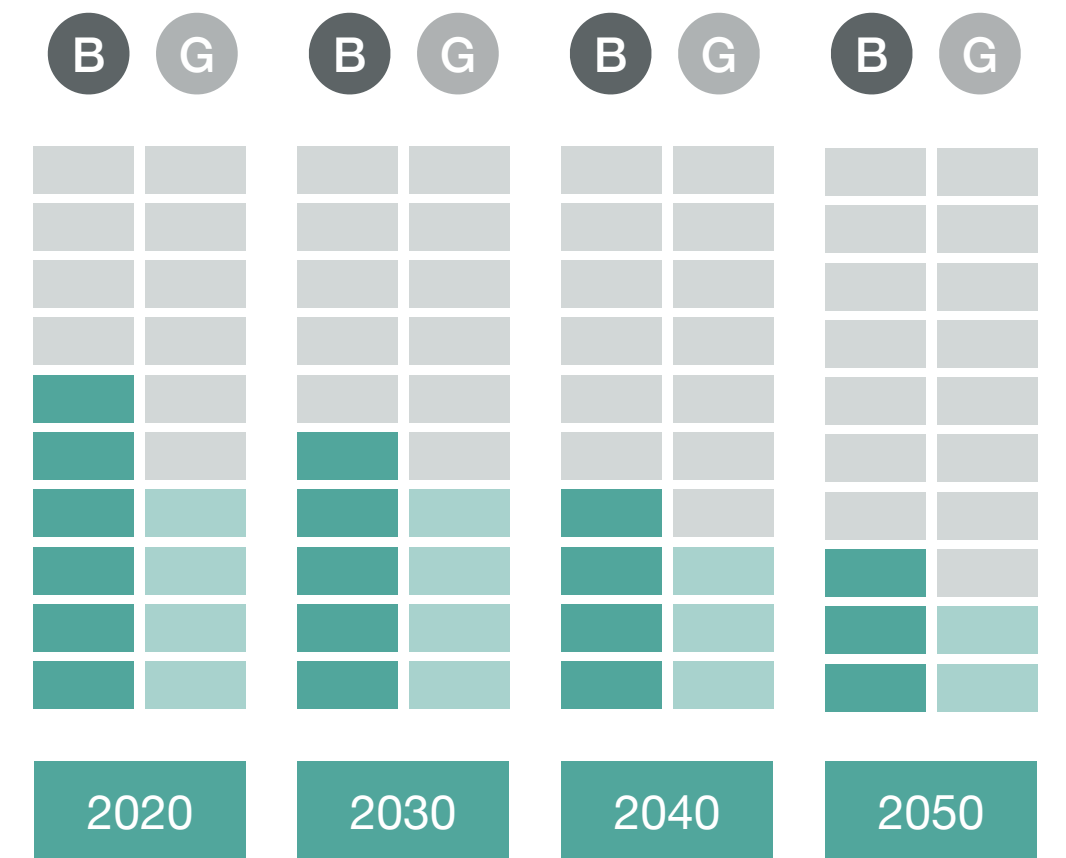
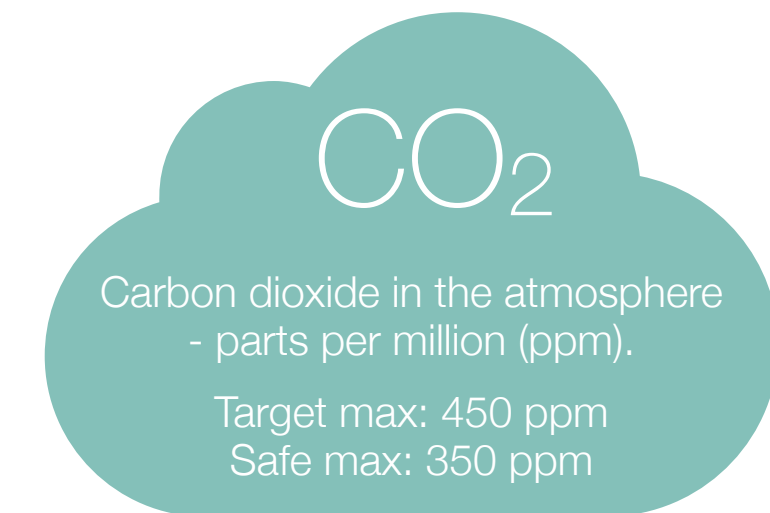
URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
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Scenarios overview

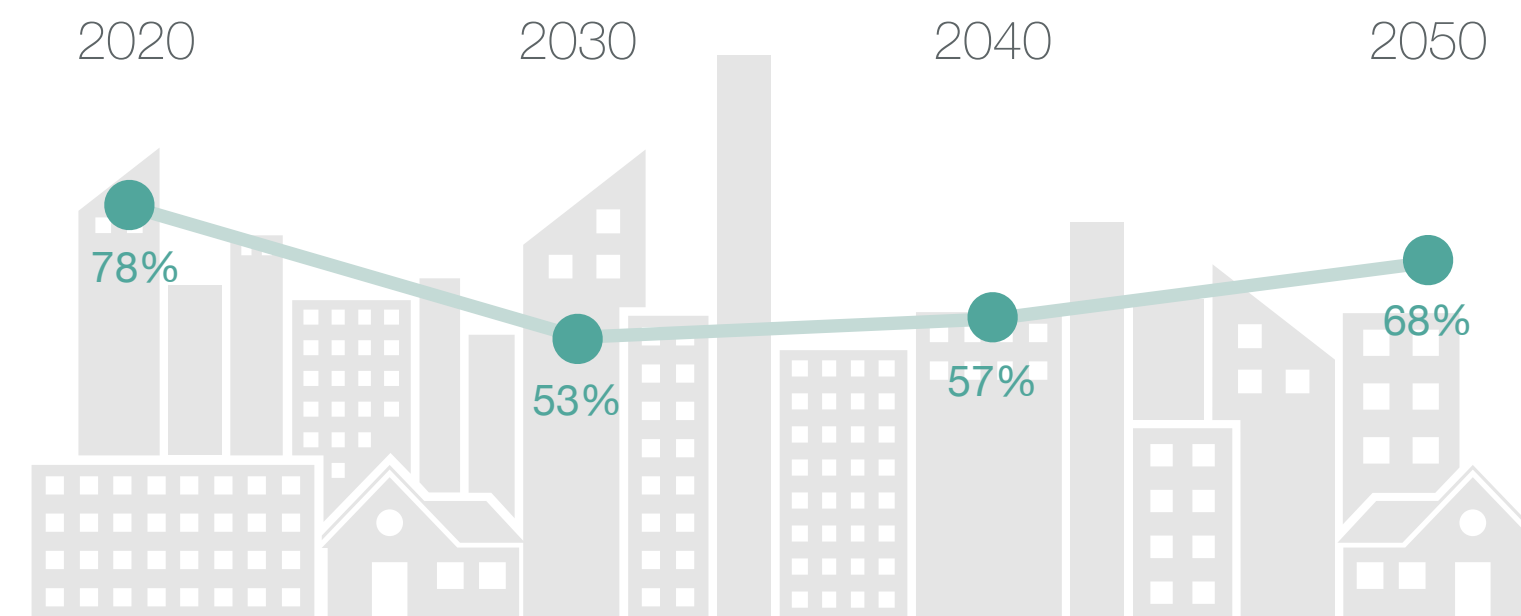
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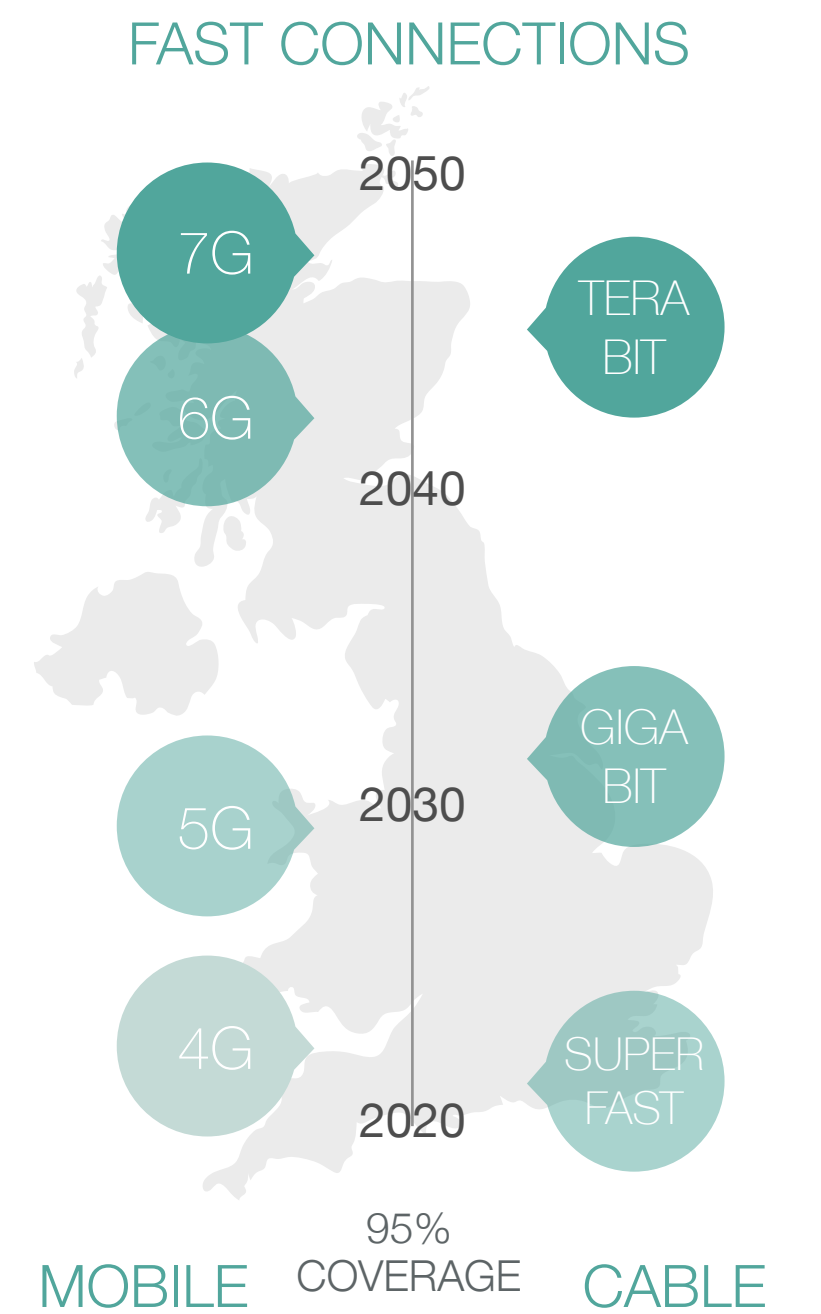
UK UNIVERSITIES IN GLOBAL TOP 100



GLOBAL INNOVATION RANKING - UK

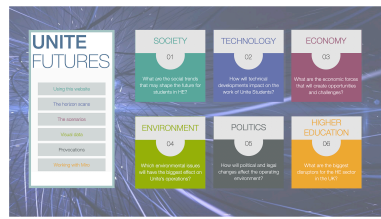


FTSE 350 STAFF WORKING IN CITY CENTRE OFFICES

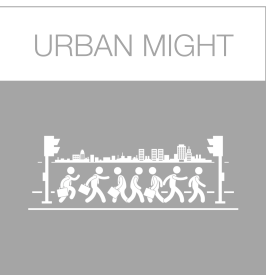


URBAN MIGHT	URBAN FLIGHT	URBAN FLIGHT	URBAN LITE
<ul style="list-style-type: none"> High density, vibrant, and resilient. The world's urban and sub-urban population will grow by 2.5 billion by 2050. Urban might is the best way to manage this growth. High density, vibrant, and resilient. The world's urban and sub-urban population will grow by 2.5 billion by 2050. Urban might is the best way to manage this growth. High density, vibrant, and resilient. The world's urban and sub-urban population will grow by 2.5 billion by 2050. Urban might is the best way to manage this growth. High density, vibrant, and resilient. The world's urban and sub-urban population will grow by 2.5 billion by 2050. Urban might is the best way to manage this growth. High density, vibrant, and resilient. The world's urban and sub-urban population will grow by 2.5 billion by 2050. Urban might is the best way to manage this growth. 	<ul style="list-style-type: none"> Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. 	<ul style="list-style-type: none"> Medium density, vibrant, and resilient. The world's urban and sub-urban population will grow by 1.5 billion by 2050. Urban lite is the best way to manage this growth. Medium density, vibrant, and resilient. The world's urban and sub-urban population will grow by 1.5 billion by 2050. Urban lite is the best way to manage this growth. Medium density, vibrant, and resilient. The world's urban and sub-urban population will grow by 1.5 billion by 2050. Urban lite is the best way to manage this growth. Medium density, vibrant, and resilient. The world's urban and sub-urban population will grow by 1.5 billion by 2050. Urban lite is the best way to manage this growth. Medium density, vibrant, and resilient. The world's urban and sub-urban population will grow by 1.5 billion by 2050. Urban lite is the best way to manage this growth. 	<ul style="list-style-type: none"> Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth. Low density, rural, and resilient. The world's rural population will grow by 1.5 billion by 2050. Urban flight is the best way to manage this growth.

Scenarios overview



Scanning microsite



UK competitiveness is weakened.
High value workers are attracted
by urban scale

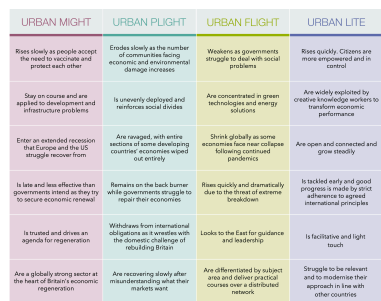


Supporting scans



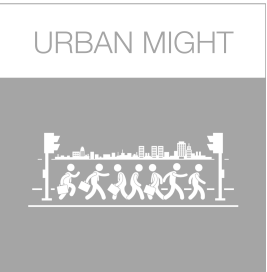
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POPULATION MATTERS The global population will continue to grow, will be more middle class and will tend to live in cities.	UNCOMMON STANDARDS Competing approaches to cybersecurity threaten global stability	THE 'C' FACTOR The economy post Covid will bring new challenges and accelerate existing trends.	ORIGIN OF THE SPECIES Loss of biodiversity is seen as a crisis on a par with the climate crisis. Losing key species could have major impacts.	PLANNING AHEAD Government's new approach to planning will see easier permitted developments and up front protection for the environment	HE'S ROLE IN RECOVERY The HE sector could play a role in recovery post Covid.	STUDENTS AS CONSUMERS Students will demand money back - and compensation - if they receive an unsatisfactory service
MENTAL HEALTH More of us, including students, are experiencing mental health issues, especially during Covid.	TECHNOLOGY CARES A range of technology to support elders who want to continue living at home instead of moving into nursing homes	FAIR'S FAIR Covid has exposed the scale of inequality in the UK. It also provides an impetus for change.	CLIMATE OPINION Public opinion matters. Increasing numbers of people believe there should be urgent action in response to climate change.	TRUST NO-ONE Trust in governments and institutions is falling around the world, particularly as a result of Covid-19	LIFELONG LEARNING AHEAD Meeting the challenge of re-skilling and upskilling a nation	ALTERNATIVE CREDENTIALS The key to making higher education reach non-traditional groups who need to up-skill or reskill
TRUTHS, HALF TRUTHS AND LIES We live in a culture of fake news which threatens our institutions and our trust in government.		FULL CIRCLE The economic, and political, future will lie in Asia. Where and how will they lead?	WILLINGNESS TO PAY Do people's behaviour's match their intentions - especially regarding environmental issues.	KEEPING IT LOCAL? The government has set great store by its levelling up agenda. How will it deliver on those promises?	CLOSURES...? Some existing universities should be closed down and new ones be established to save the HE sector	BILINGUAL EDUCATION Taiwan's education ministry is driving expansion of degrees and postgraduate courses taught in English
THE FUTURE OF THE CENTRE The centre of cities will need to be reinvented to accommodate different patterns of living, working and playing.		JOB'S OF TOMORROW New jobs will require constant retraining and are likely to require a mix of technical and soft skills.	GREEN PREMIUM How much are people willing to pay for 'green' goods and services?	SOFT POWER DOWN BREXIT has damaged the UK's reputation around the world and signals further international decline	MERGERS...? A strategic restructuring of further and higher education?	OUT OF AFRICA The number of African students enrolled in Chinese universities has increased by 4,549% in a 15 year period



Scenarios overview

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UK competitiveness is weakened.
High value workers prefer remote
working.



Urban Flight describes a future where the UK is globally uncompetitive and where high value workers prefer to work remotely. The UK's lower economic performance is not due to a lack of productivity or investment by the big corporates, but because of a shared commitment to tackling the climate emergency. The UK is a leader in circular economy practices, environmental industries and the simpler life. Travel within cities is green and clean; travel between cities and overseas is rationed. People are less well off financially but social capital is much higher. Government has developed a green infrastructure which will be rolled out across the UK. Higher education is one of the UK's success stories, exporting education and research services with a minimal footprint.



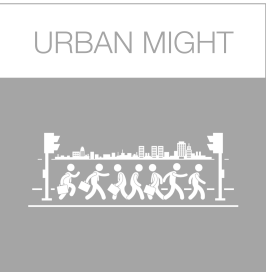
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly competitive economy with high productivity and innovation. High value workers prefer to work remotely. High value workers prefer to work remotely. High value workers prefer to work remotely.	Highly competitive economy with high productivity and innovation. High value workers prefer to work remotely. High value workers prefer to work remotely. High value workers prefer to work remotely.	Highly competitive economy with high productivity and innovation. High value workers prefer to work remotely. High value workers prefer to work remotely. High value workers prefer to work remotely.	Highly competitive economy with high productivity and innovation. High value workers prefer to work remotely. High value workers prefer to work remotely. High value workers prefer to work remotely.

Scenarios overview

2021	2024	2027	2030	2033	2036	2039	2042	2045	2048	2051
Climate concerns fail to gain traction	Environmental refugees increase	Nipah pandemic more disruptive than covid-19	UK families move out of declining cities	China, India and US lead global change	The UK constructs its first garden village	Student numbers begin to rise	HE courses restructured for distributed population	Wèilái and UK collaborate on global rollout of garden villages	Britons are comfortable living with scarcity	UK GDQ increased by 2.8%



UK competitiveness is weakened.
High value workers prefer remote working.



The view from 2051

It is 28 November 2051 and today's news that UK Gross Domestic Product (GDP) has declined for the 25th consecutive quarter is no real surprise given the recent trajectory – but in these challenging times, it is still, nevertheless, an achievement worth celebrating. All the more so since the UK's Gross Domestic Quality (GDQ) has increased by 2.8% for the 3rd year in a row.

No wonder Britons are congratulating themselves.

The results are a validation of everything the UK has done in the three decades since the covid-19 pandemic of the early 20s was followed by the [mental health pandemic of the late 20s](#) that utterly debilitated UK society. Like coronavirus, anxiety and depression were indiscriminate, attacking those in work as well as those outside it.

The sustained drive to work from home – driven by business leaders with spacious homes and people to fix any connectivity problems - was simply too much for most. For those who relied on work for human connection, one lonely day drifted into another. For those who were unsure of themselves and who needed encouragement and guidance, managers were remote - in all senses. For those desperately juggling work, family and children's lives from one table in the kitchen, everything was balanced on a knife edge; and they could easily fall off if school closed again at the last minute or if food stocks were low in the supermarket.

The generation who once watched their parents struggle and who felt anxious, confused and sidelined by the political system have grown up now and are the ones making the decisions about the future. They care about their own and their communities' wellbeing, about their children's health and prospects and about fixing the planet. More of them have lived with scarcity than their parents ever did and believe unnecessary consumption to be indulgent, selfish and destructive.

They are more optimistic now that we have accepted the path of lower consumption.

Britain chose that path before it was forced on us, which is why we don't resent it the way other societies do; and, since we've been doing longer than others, we are more expert at it. Circular economic practice is embedded. People eat better, exercise more and demand healthier goods and services. Product leasing and sharing has increased and ownership has declined. Goods without inbuilt longevity and a traceable environmental footprint do not sell.

We have strengthened our rural communities and centres of production and built extensive e-infrastructure outside the cities. Peri-urban areas are growing bigger as families diffuse away from city centres, moving towards greener, healthier pastures. Our larger cities may still have some way to go to improve - and many continue to lose population - but Britain is driving the changes it needs to make.

It hasn't always been easy but it is necessary.

The burning platform

Britain was certainly not chill - in any sense - for the first two decades of the 21st Century. As the world warmed up and the number of species on the planet [went down](#), citizens of the developed economies expressed their frustration over lattes and at dinner parties and on social media. Some of them hit the streets for increasingly activist forms of protest and disruption but they somehow failed to make any kind of significant impact on global consciousness. When Greta Thunberg made her first big entrance on the world stage, castigating world leaders for their inaction on climate change and – perhaps more notably – suggesting they were not mature enough to face up to the challenge ahead, as many people switched off as stood up to applaud her. When British naturalist and broadcaster Sir David Attenborough spoke out with increasing urgency in the mass media and at global summits on the imperative to take significant action on the climate, he was listened to politely before ministers headed off to their backrooms to make deals.

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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High quality, affordable housing is the norm in urban and peri-urban areas.	London leads the nation in the quality of its housing, with a mix of high and low cost options.	High quality, affordable housing is the norm in urban and peri-urban areas.	High quality, affordable housing is the norm in urban and peri-urban areas.
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Scenarios overview

2021

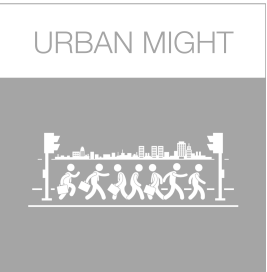
Climate concerns fail to gain traction

2048

Britons are comfortable living with scarcity

2051

UK GDQ increased by 2.8%



UK competitiveness is weakened.
High value workers prefer remote working.



It can be hard for those who didn't live through the period to realise how much of a phony war it seemed the world was engaged in at that time. The volume of those expressing commitment to act was dialled up and some businesses made significant efforts to improve their global supply chains but the market continued to demand plastic, air travel, fuel, cotton dresses and meat. Producers continued to supply them, to pollute, to deforest and to make a buck. Politicians continued to procrastinate, to be deflected by more urgent (read "more populist") matters and to marginalise and make fun of green parties around the world.

At the same time, people in the southern hemisphere were losing their lands and livelihoods, suffering disease and privations and moving en masse to nearby parts of the globe that were a little less arid or not yet under water.

It took the first global pandemic (covid-19, 2020-23) to make the developed world realise how simple it was to (literally) ease off the gas. As the majority of people stopped moving in the early 2020s ('went into lockdown' in the parlance of the time), it became much clearer what the human and environmental cost of unconstrained consumption was - and much clearer to see how changing the way we lived and worked could, over time, reverse hundreds of years of bad decisions.

Even so, it took the shock of the second, deadlier pandemic (Nipah, 2025-27) to effect significant behaviour change. That the stimulus to change was unenlightened self interest - the rush to protect against disease - rather than enlightened values and concern for the planet matters not one jot now.

The main act

Covid-19, it transpired, was simply the warm up act. Nipah, which jumped from fruit bats to humans, caused severe respiratory problems and swelling of the brain and had - still has - a mortality rate three times higher than covid-19. There was no vaccination for the Nipah variation when it hit and the disease's long incubation period meant it spread widely when it first jumped. Like covid-19, Nipah started in China; like covid-19 it spread everywhere.

Nipah's impact was profound. The world had only been out of the covid-19 pandemic for two years and had been rebuilding its way out of the depression. International trade had resumed - a little too enthusiastically it transpired - as economies tried to generate sufficient wealth and tax revenue to pay for the spiralling costs of paying off huge deficits.

It was, inevitably it now seems, the rush back to physical movement of goods and people that provided the channels Nipah needed.

The world shut down instantaneously and with one accord. Recovery, however, happened at different speeds. East Asian nations, who had stricter control measures in place and were willing to use them with extreme prejudice, weathered the storm better than those without and began recovery earlier. They held the momentum, taking on leadership roles in global institutions, increasing investment in the Belt and Road Initiative, New Development Bank, and Shanghai Cooperation Organization and providing much-needed relief and an economic spark for any friends requiring capital.

As Nipah faded, so did the US tech platforms battling China for global domination. From AI to remote learning and from telehealth to autonomous vehicles, China gained the upper hand - and control over more and more data.

It also expanded its green energy programme, focussed on renewable hydrogen. As it entered the 2030s, China had a national refuelling infrastructure in place, mass transportation systems and short haul hydrogen aircraft at its disposal. It began to offer the technology to the rest of the world.

The troubled thirties

The 2030s were not a good decade. While recovery in the East continued, the more libertarian regimes of the west found themselves in disarray. The southern hemisphere was simply clinging on, hoping against hope that someone would come to their aid before it was too late.

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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
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Scenarios overview

2021

Climate concerns fail to gain traction

2024

Environmental refugees increase

2027

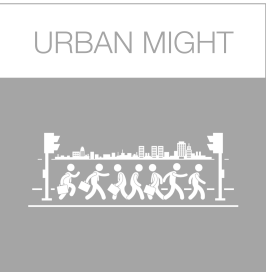
Nipah pandemic more disruptive than covid-19

2048

Britons are comfortable living with scarcity

2051

UK GDQ increased by 2.8%



UK competitiveness is weakened.
High value workers prefer remote working.



The UK was badly hit. There were significant numbers of business failures across all sectors, with small and micro-businesses - the vast majority of the business base - hardest hit. Government was forced to take ownership stakes in strategic, high-employment businesses to help protect jobs and regional economies but was saddling itself with unimaginable debt for future generations.

The toll on Britain's mental health was immense. A decade of impossible choices - stay in or go out fearfully, get a job where you can work from home or don't work, stay apart from friends and extended family or risk the fines - coupled with a continuous flow of contradictory information about safety and biosecurity simply ground people down. People who, in the early 21st century, did not have the resilience of their forefathers who expected less easy passage through life.

Unemployment rose and the informal economy quickly grew to fill the vacuum. Barter systems were commonplace, where participants could pay for services received with 'currency' they earned from services offered. Mainstream systems focussed on everyday needs - haircuts in exchange for cycle repair; decoration in exchange for gardening - while dark systems provided access to illegal necessities. Drug culture and the infrastructure to sustain it became a bigger blight than poverty, ill health and suicide combined. Prices rose, food supplies declined and social divisions amplified. Personal freedoms were threatened. So were children, exploited by gangs to run drugs and other dark materials between communities and cities.

And so families began to move out from cities towards suburban, peri-urban or rural hinterlands. It was only a small number at first, but as social conditions worsened, as physical infrastructure began to crumble and as cities offered more threat than opportunity, the exodus gained momentum.

A change of age

When China hosted COP 32, the United Nations' Climate Change conference, the global consensus was that demanding times required demanding solutions. After months of pre-negotiation and a tough week of bilaterals, governments agreed to put the health of the planet at the heart of collaborative policy making.

It was a no brainer, really. The environment needed fixed and the new deal would achieve that. People needed jobs and the new deal would bring them. Cities needed to be rebuilt - economically, physically and socially - and that was on the table. Most of all, failure to act would be destructive for everyone.

The first step was to set up Wèilái, the supranational agency tasked with integrating environmental targets into all aspects of legislative decision making across the world. China, India and the USA appointed climate science advisory boards to direct national legislation, manage regulation and agree 'incentives' for those that continued business-as-usual operations. Whilst some OPEC countries were able to successfully transition from oil-based to more diversified economies, others struggled to recover from the loss of their prime economic assets.

Implementation was more disruptive and painful than governments anticipated. The changes to where people lived, what they ate and how they travelled were sudden and extreme. Low skill workers were tasked with cleaning up environmental pollutants and processing materials for re-use. Governments tried to rebuild urban centres using sustainable housing. High yield crop strains were made freely available across the world and continuously improved to withstand climate shocks and new threats from insects and microbes. Energy was harnessed from the sun, the wind, the waves and - latterly - Chinese hydrogen.

Pervasive carbon taxation and individual carbon allowances severely slowed consumerism for the aspiring global middle-class. Diets changed as the pricing mechanism for carbon-intensive foods, such as coffee and meat, put them beyond most people's reach. Engineered substitutes became plentiful, tasty, nutritious and (still to this day, unfortunately) pricey.

The speed of change was breathtaking. Within a decade, the world became radically different. There are, sadly, too few who will say that the world also became better. They will, one day, but for now there are only a few pockets of the globe where a fortunate combination of space, natural resources and a willing and compliant population has made the transition straightforward and positive.

One of those corners is Great Britain.



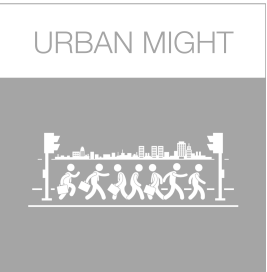
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly resilient, with a strong focus on sustainability and green infrastructure. The city is a leader in innovation and digital technology.	Highly resilient, with a strong focus on sustainability and green infrastructure. The city is a leader in innovation and digital technology.	Highly resilient, with a strong focus on sustainability and green infrastructure. The city is a leader in innovation and digital technology.	Highly resilient, with a strong focus on sustainability and green infrastructure. The city is a leader in innovation and digital technology.
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UK competitiveness is weakened.
High value workers prefer remote working.



This greener and more pleasant land...

The UK's renaissance is as remarkable as it is unusual. Perhaps that is because it started early and because - fortunately - its programme secured Wèilái's approval and support early on.

Britain's modern garden villages are newer versions of the garden city concept that the government developed in the late 2010s. Construction of the first began in 2036 to the north of London and phase two created 4 more in different locations across the UK. There are plans for a further 6 villages over the next decade although the results from the current crop suggest that government might jump straight to the main programme rather than worry about more pilots.

Like their 2010 big brothers, garden villages are designed to support local stewardship of community assets in order to build strong and sustainable relationships between residents, businesses and the land - but the similarity ends there.

Where today's garden villages differ is in their purpose. They are a test bed for the cities of the future that Britain will need if it is to sustain its low carbon footprint. They are designed – through their dense and cultivated vegetation - to be green lungs for the older cities around them. They are built of materials that absorb light during the day and expel it at night. They use green walls to reduce pollution and heat loss and to improve air quality. They are planned around the needs of people and designed to support low carbon mobility such as walking, cycling and green electric vehicles.

It is not clear whether the 6 new villages that are currently planned will go ahead. The government has learned what it needs to do to create a garden ecosystem in Britain's existing cities to make them healthier, safer and more prosperous and it is able to go ahead with an extensive programme of regeneration. The trouble is that people love the garden villages and more people want to go there. Developers are lining up and the the UK faces a more fundamental question about its future infrastructure.

The garden village concept is catching on and UK planners are in discussion with Wèilái about an international development programme. The ambition is boundless and builds on the UK plan to repurpose villages and landscape according to its environmental needs - 'hydroelectric' villages in Scotland and Wales to harness energy; 'biocrop' villages in the north and west to farm fuel; 'larder' villages in the south and east to produce food. Extending the concept is limited by land and energy availability - whether bio or hydrogen - but the UK's garden cities planning could yet expand to become the world's heart and lungs.

...mainly

Not everyone is happy with the UK's change of direction, of course. Even after all this time and destruction, many people still prefer making money to caring for the environment and are frustrated with with the focus and pace of change in the UK. Unrest in pockets of the cities remains high and the Push Greenback protest movement is growing at home and abroad.

There has been a significant shift in the balance of power. National governments manage implementation on behalf of Wèilái and operate through an extended local government infrastructure. Citizens scrutinise local government carefully to ensure it sustains the focus on sustainability and procurement, working practice and service delivery are organised around circular economy principles. Local taxation may rise, but citizens are willing to pay for the sustainable services they want.

Higher education

Higher education has suffered something of a bumpy ride over the last couple of decades but is now regarded as more of a luxury than a necessity - and that is a positive thing. Student numbers declined significantly through the 20s due to the decline in over 18s and the second pandemic but have been climbing over the last few years.



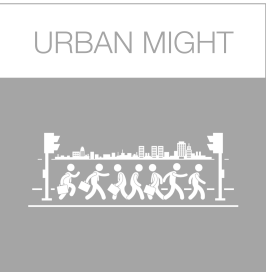
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High quality, sustainable living in the heart of the city, with a mix of housing and green space.	High quality, sustainable living in the heart of the city, with a mix of housing and green space.	High quality, sustainable living in the heart of the city, with a mix of housing and green space.	High quality, sustainable living in the heart of the city, with a mix of housing and green space.
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Much of this growth is driven by interest in environmental science and societal health and wellbeing. The most popular courses are structured around modular micro credentials that can be combined in any way the learner wants. Theory is popular and delivered online; some universities facilitate local group learning seminars once a quarter but they have mixed success. Practical courses are more popular and these are delivered in distributed labs, gardens and engineering schools. Scheduling practicals is a labour of love and frustration - students attend their nearest university (irrespective of where they are enrolled) and are supported by local demonstrators and tutors. Internal (to the sector) fee transfers cover the costs.

Vocational courses with a high practical content - medicine, dentistry, bioscience, agriculture, econeering (for example) - are mainly based on site and delivered over 40 week annual learning blocks. City universities are more popular for medicine, dentistry and econeering and rural campuses do better for bioscience and agriculture. Student security remains a significant problem in the big cities and learning and accommodation providers invest heavily after the reputational damage of student deaths during the Push Greenback demonstrations. Wèilái, too, has made it clear that security is paramount for any of its ventures with partners.

The UK's strategic alignment with Wèilái has proved a boon for the sector. The UK is selling its knowledge and expertise in social engineering across the world and HE is a key partner in that business. The UK's value comes less from 'me too' research and teaching than from its strengths in building, developing and sustaining green villages. Thankfully, that's a growth market.

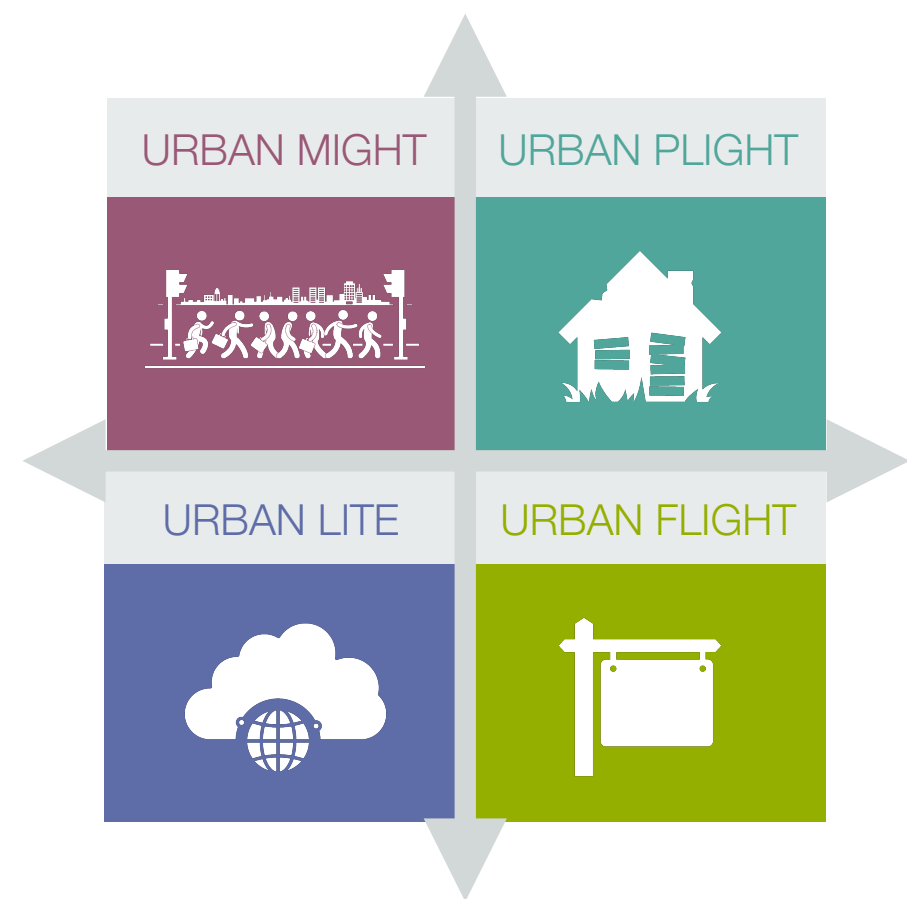
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly skilled workers migrate to the south to escape the north and the east, leaving the north and the east in a state of decline.	Highly skilled workers migrate to the south to escape the north and the east, leaving the north and the east in a state of decline.	Highly skilled workers migrate to the south to escape the north and the east, leaving the north and the east in a state of decline.	Highly skilled workers migrate to the south to escape the north and the east, leaving the north and the east in a state of decline.
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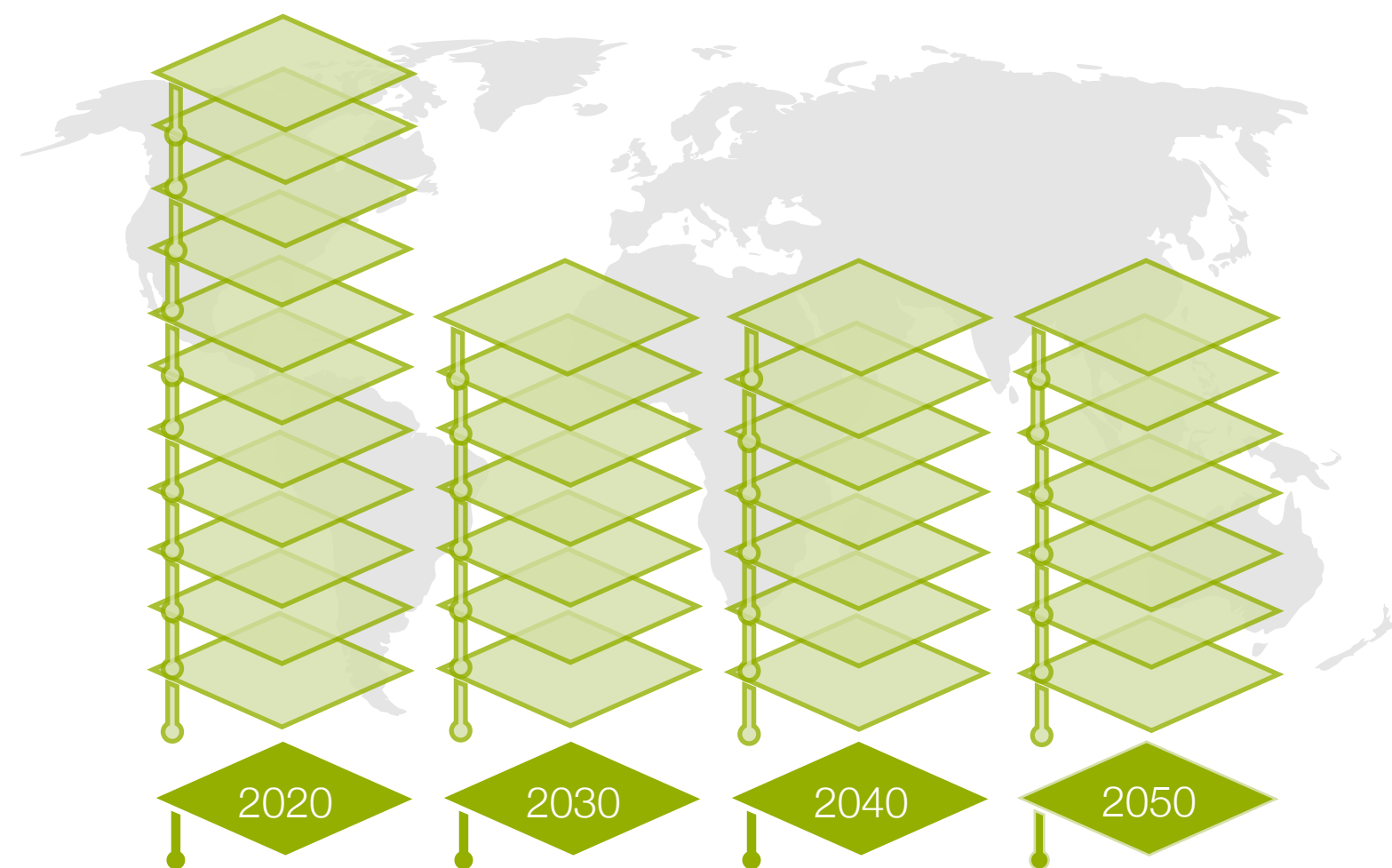
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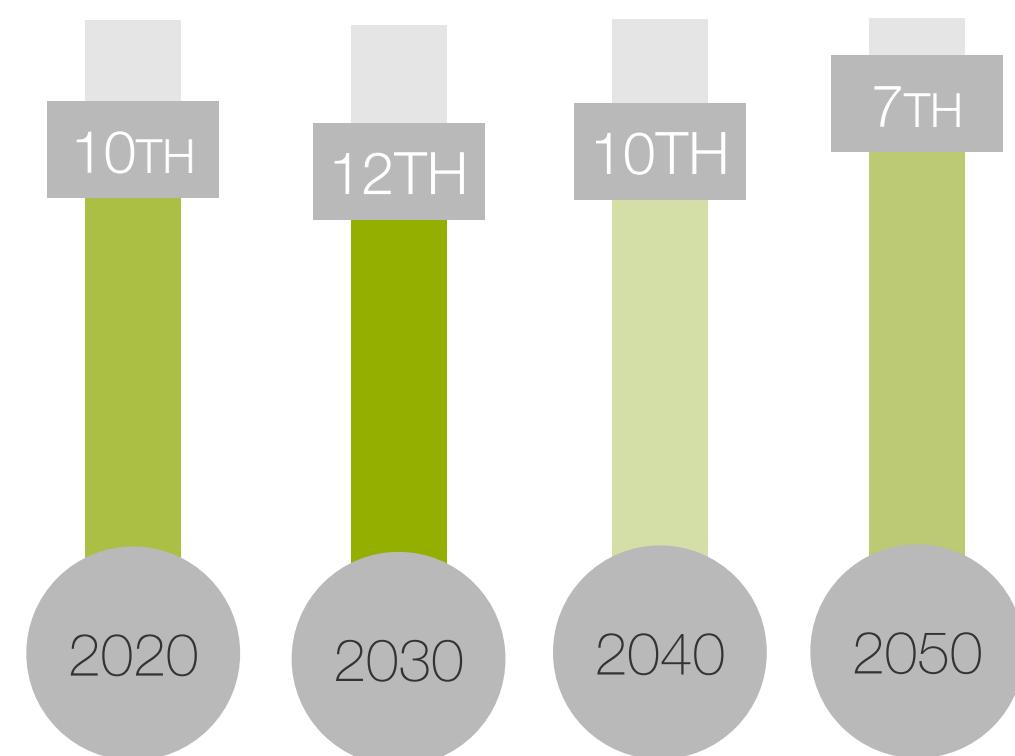


URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
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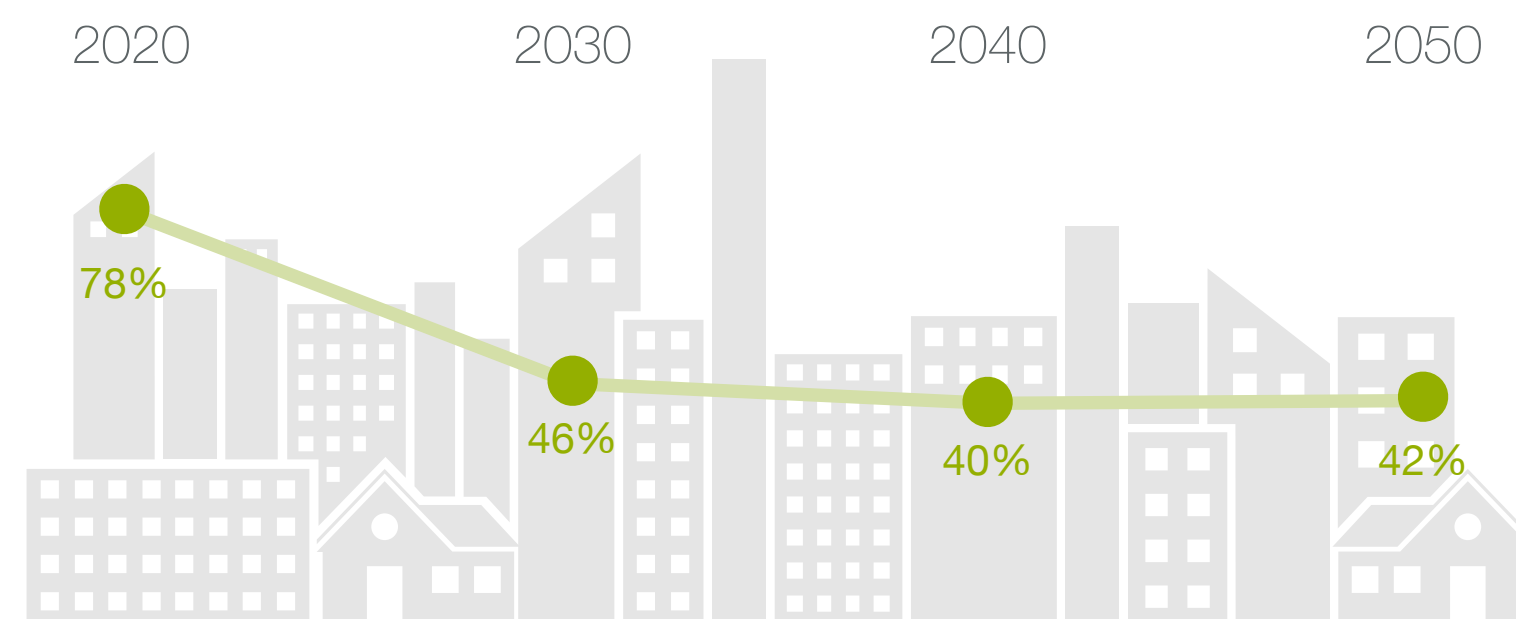
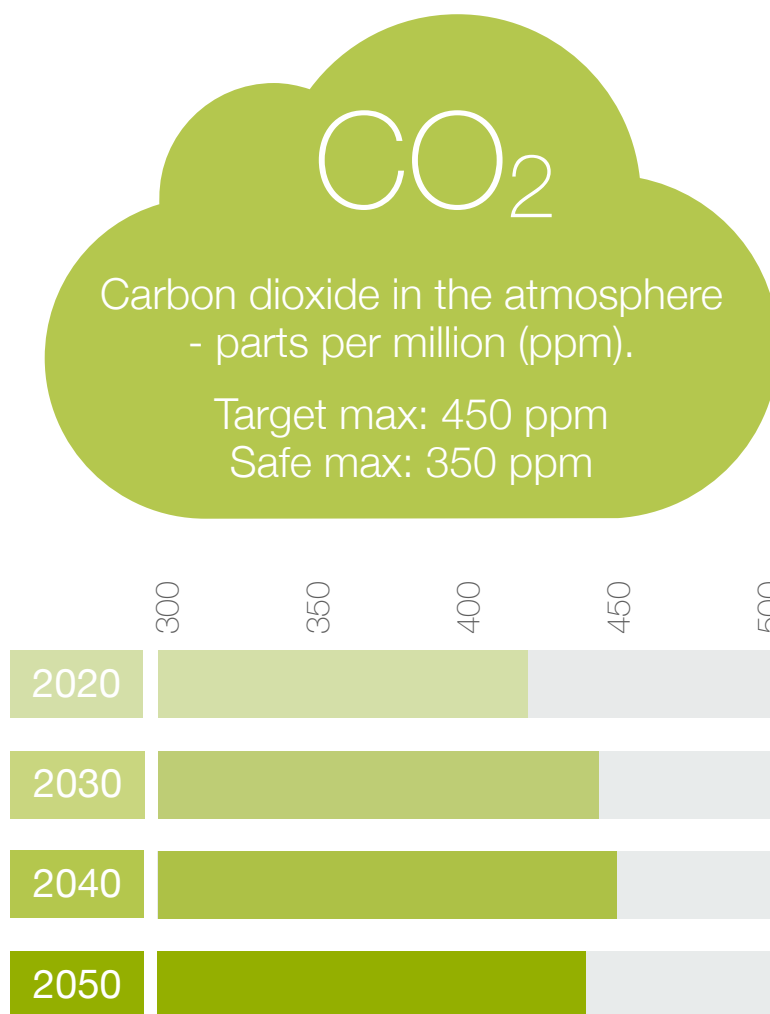
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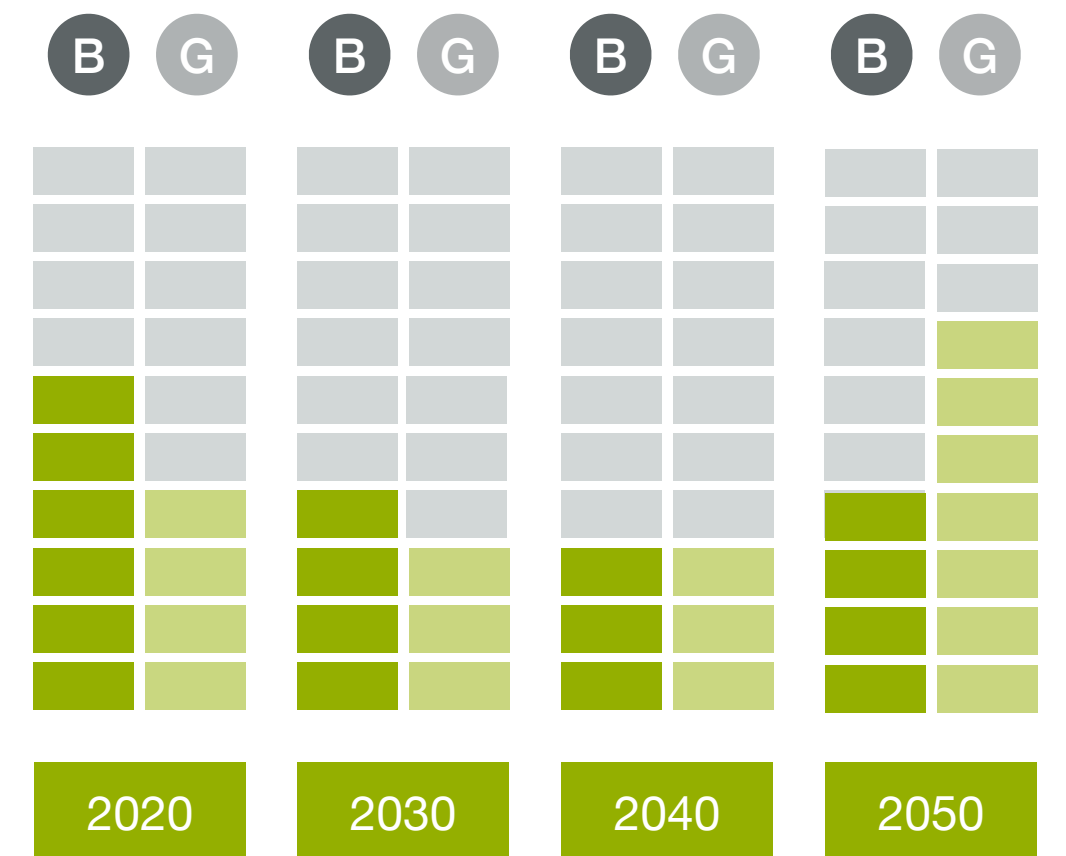
UK UNIVERSITIES IN GLOBAL TOP 100



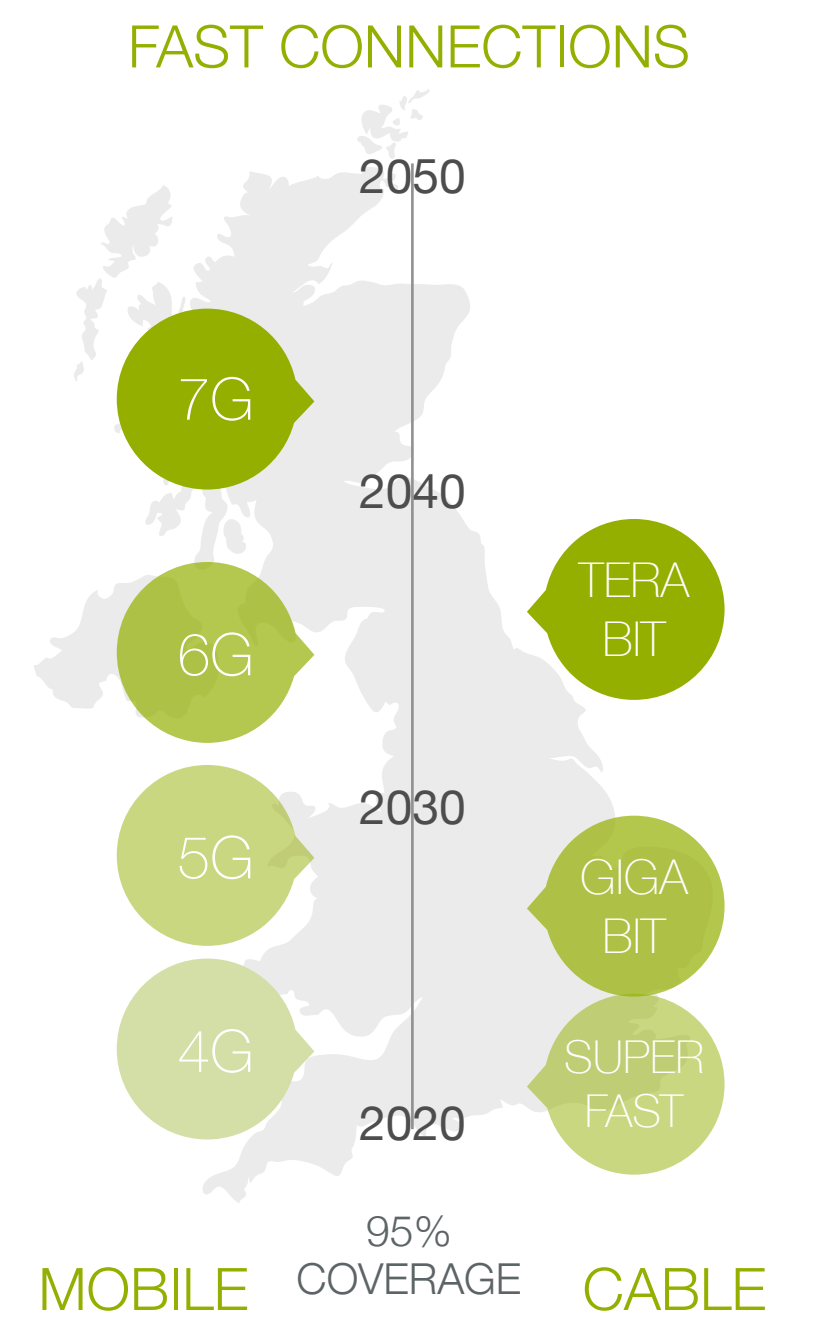
GLOBAL INNOVATION RANKING - UK

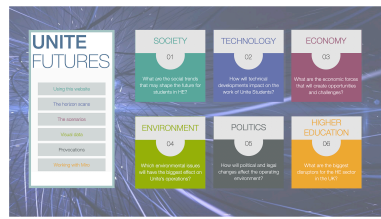


FTSE 350 STAFF WORKING IN CITY CENTRE OFFICES

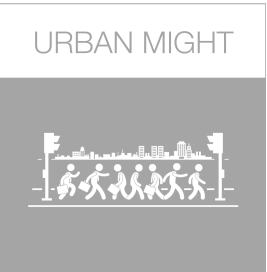


EDELMANN TRUST INDEX
BUSINESS AND GOVERNMENT





Scanning microsite



UK competitiveness is weakened.
High value workers prefer remote working.



Supporting scans



THE ACTIVE CITIZEN

Young people are just as likely to be engaged with their community or with politics - but in different ways.

THE HYDROGEN ECONOMY

Government will work with industry to evaluate hydrogen as an option for heating homes and workplaces

THE 'C' FACTOR

The economy post Covid will bring new challenges and accelerate existing trends.

BUILD BACK GREENER

Can greener regeneration and construction be part of the post-Covid dividend?

THE ENERGY WHITE PAPER

The White Paper outlines what the UK will do to achieve its net-zero targets on carbon emissions by 2050

INTENTIONAL LEARNING

The world of stable lifetime employment has faded in the rearview mirror. Intentional learning is the way forwards

WILL COVID DISRUPT HE?

Is the HE sector poised on the brink of transformation? Or will universities revert to business as usual?

UNEQUAL WORLD

Inequality is rising sharply across the world - with major impacts for the poor as well as for society at large.

CLEAN MEAT

Cultured - or clean - meat allows consumers to eat meat with no moral, health or environmental concerns

FULL CIRCLE

The economic, and political, future will lie in Asia. Where and how will they lead?

BIOLOGICAL BUILDINGS

Radical ideas for fusing living structures into new buildings.

PLANNING AHEAD

Government's new approach to planning will see easier permitted developments and up front protection for the environment

END OF SMALL CAMPUSES?

Unity College in Maine has opened up debate about whether small institutions really need flagship campuses to survive

LIFELONG LEARNING AHEAD

Meeting the challenge of re-skilling and upskilling a nation

ROUND AND ROUND WE GO

Circular economy systems offer ways of organising a business to minimise environmental impact and resource use.

BUILDING INNOVATIONS

The leading edge of green construction technologies could transform future buildings.

BUILD BACK BETTER

The Government has set out plans to make homes and non-domestic buildings carbon-ready by 2025

CLOSURES...?

Some existing universities should be closed down and new ones be established to save the HE sector

REACH FOR THE DOUGHNUT

A few cities and regions are starting to adopt 'doughnut economics' as a way to address social and environmental issues.

CLIMATE OPINION

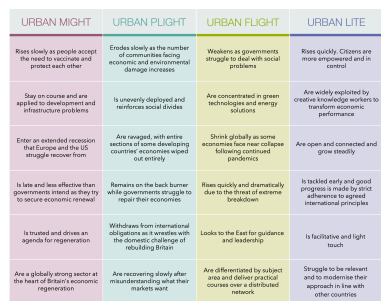
Public opinion matters. Increasing numbers of people believe there should be urgent action in response to climate change.

WHO TAKES THE HIT?

Pressure mounts on universities in England to offer a rent rebate and an academic safety net for students

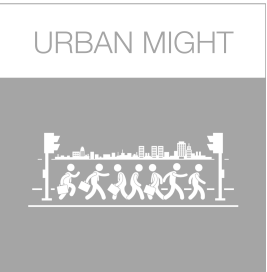
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The UK is globally competitive.
High value workers prefer
remote working.



Urban Lite describes a future where UK is globally competitive and where high value workers prefer to work remotely. Britain has invested heavily in the knowledge, ideas and application of creativity that has made it one of the foremost knowledge economies in the world. Most people work in cyberspace rather than in physical space and full fibre broadband is everywhere. Increasing numbers of the population have moved out of expensive and congested cities to the fresher air and greener vistas of the country. The continuing exodus of high value, high spending and demanding consumers means that investment in city infrastructure is less important at present. Of course, Britain's high value workers are not necessarily British; or even located in the UK. Equally, those living in Britain do not necessarily work in Britain; the wealth generators are digital nomads who work around the world and live around the world too.



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Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work	Knowledge workers disperse throughout the UK	Knowledge facilitation achieves 52% of UK exports	World delivers effective environmental change	UK a favoured destination for knowmads	UK HE struggling to modernise	Physical offices are transformed



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The view from 2051

It is 28 July 2051, one month after Birmingham's new and much anticipated City Museum opens to the public.

The Museum offers a truly diverting experience. The recommendation that visitors allow three hours to go round seems overly generous when booking your time slot, but there is so much to see - and in such detail - once inside that many people are staying longer or booking a second visit immediately.

It's very hands on. Visitors are able to experience every aspect of the working day from the crowded tube journey to the private cubicle, physical workstation (complete with keyboard and screen) and glass fronted 'meeting rooms' that feel small, oppressive and must have been wholly uncondusive to work. Visitors can even enjoy a meeting experience, selecting from a wide menu of themes. 5 minutes of this is enough to make you wonder how anyone ever got anything done. The Whitehall Teams Experience - Teams was an early meetings software - is particularly enlightening

It's a nice touch that the Museum is only open between the hours of 9 and 5 Monday to Friday, although it's not clear how long this will last. Contrary to rumours being moderated by the chatbots, these hours weren't chosen to let the west coasters in before they start work; nor to prevent the antipodeans getting there after work (surely they can instruct their diaries better...). If you get the chance - and know why the City Museum is open at such curious times - explain to a nomad of your acquaintance. Their reaction will be priceless.

Many visitors are struck by just how much stuff their parents and grandparents needed to work in an office; and astonished at the physical space it required. This is particularly striking in the 'covid-safe' office, where more than one visitor has recorded in the feedback that the rental cost per worker figure must have been miscalculated. It hasn't been, of course.

There was, it transpires, a lot of noise in the old days. Somehow, even although there can be a lot of noise in today's workspaces, it seems more *primitive* in the Museum. Perhaps this is artistic licence, but it is very visceral.

Absorbing? Certainly.

A legacy today's workers can learn from? Not so much.

A visit to the City Museum will leave you intrigued, fascinated and thankful. If there is one thing that could be changed in this excellent Museum it is a clearer sense of the journey the world has been on in the last generation or two and how we came so far so fast.

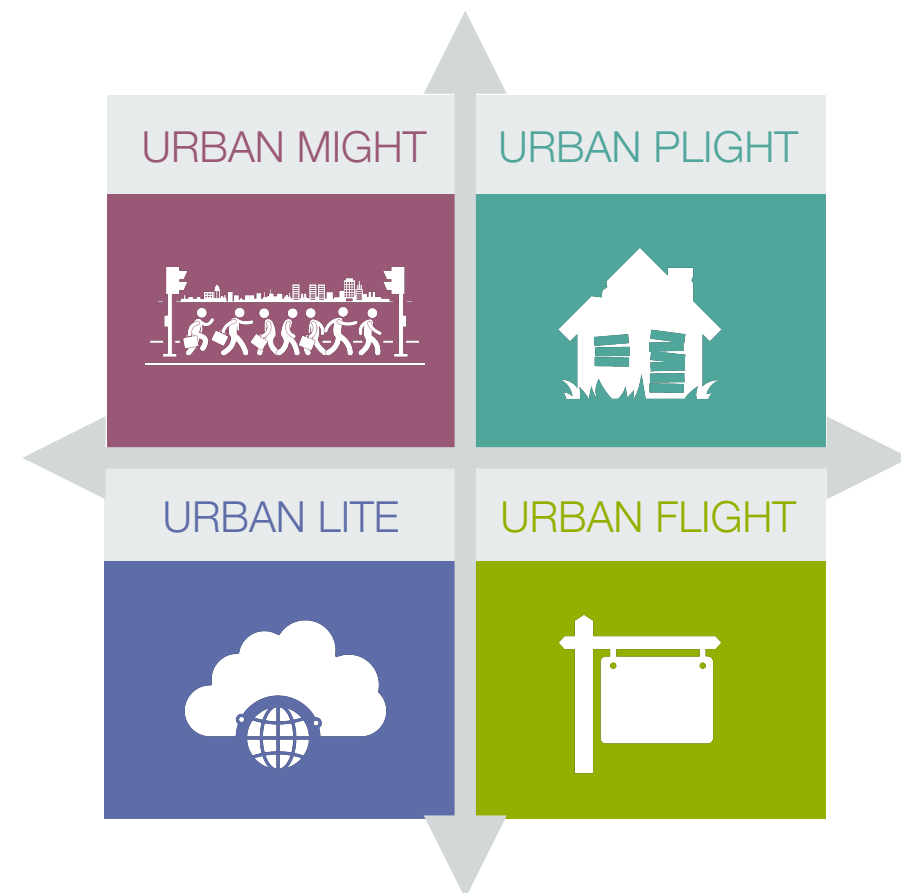
The business of risk

It was fashionable in the late 2010s to talk about '[the fourth industrial revolution](#)', the migration of all forms of work onto digital platforms and the embedding of AI into all processes and operations. The technologies that enabled this transformation had been aligning for some time and causing much excitement but had not yet gained sufficient traction to transform the workplace when the covid pandemic arrived in 2020.

There were two main reasons for this state of affairs. The first was outside direct human control: the inertia built into the global economic system.

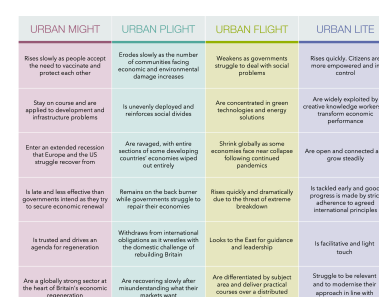
The second was not: the inherent unwillingness of business leaders and politicians to take the long view. Few were willing to risk first mover advantage in case of failure - and in case shareholders demanded their resignation.

So it was, then, that the early years of the 21st century - like most of the 20th - were characterised by fine, if pedestrian corporate performance and a complete failure to understand what wellbeing is. The majority (just) of the world's labour force may have been better dressed and may have had more and better holidays than their great grandparents, but they were undoubtedly poorer.



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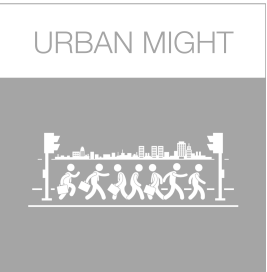
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2021

Leaders
unwilling to take
the long view

2051

Physical
offices are
transformed



The UK is globally competitive.
High value workers prefer
remote working.



The world had (until the arrival of covid-19, anyway) eradicated many of the diseases that killed huge swathes of the population and that kept women (in particular) in servitude, but it had paid scant attention to the mental health crisis that was already reaching pandemic proportions before covid-19 struck.

The remarkable thing about covid-19 was not that it happened - scientists had been warning about the possibility of such an eventually for decades - nor that the world was caught on the hop by it - few governments at that time were practised in foresight - nor even that politicians (eventually) set aside their differences to make the surviving populace safe again.

The remarkable thing was that covid-19 was the catalyst that delivered what generations of protest had failed to: emancipation of the workforce.

Power to the people

The covid-19 pandemic lit the fuse that [changed the global economy](#). It wasn't the number of deaths that made change happen - less than 10% of the number who died in the Spanish Flu pandemic of 100 years before - so much as the pandemic's impact on those who survived.

They found the [established order turned on its head](#). All their lives, people had gone out to work in factories, offices, shops, schools or wherever. Most of those places closed when the pandemic hit and millions found themselves working from home - just as effectively, often more efficiently and always without middle managers wandering around calling meetings with limited purpose other than to fill an empty schedule. The changes wrought by the pandemic increased efficiency, fostered creativity and handed individuals back a measure of self direction.

People found, in other words, that they could organise their work and working lives better on their own and that they could continue to deliver - perhaps even increase - value for their employer.

Middle managers began to hold zoom meetings with each other to fill time.

Once the threat of coronavirus began to subside, employees were less enthusiastic about getting back on the train for an hour or three's commute each day. They had become used to seeing their children before bed through the week; going for a walk at the end of the day; eating more healthily and exercising regularly. They found themselves to be more productive and more creative in their approach to work problems.

They also found themselves increasingly irritated by a public discourse that offered opinions such as "[...the physical workspace acts as a cognitive scaffold conveying important messages about culture and relational belonging](#). We are social beings and the relational connection in the office for cohesion and idea sharing is still very important. High value work involving knowledge sharing is best accomplished where people gather, namely, offices...

These opinions gained traction with employers who had more and more unused floor space in expensive central locations and less and less access to the knowledge and innovation required to create value from it. That resided in the employees who were increasingly unwilling to return to slogging into the office when they could work better from home.

As the pandemic receded, the first of two big fissures became clear. Employers wanted employees back in the workplace. Employees were disinclined to acquiesce - either at all or without significant concessions. The problem for employers back then was that the key factor of production in 21st century businesses - knowledge - was not harvested by the labour force. It was harvested from them. Suddenly, handing all that value over for a few pennies didn't seem like such a good idea. By 2022, most white collar employees (as they were known then) had figured out what their bosses had known for three decades: that they now held the balance of power. They decided it was time to change the transactional relationship.

Being tech savvy, of course, the movement was organised. The conversation began slowly enough on [changetherules.uk](#) but grew in popularity and reach. By 2023, 1 in 8 knowledge workers was participating in the online forums regularly.

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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly skilled workers are the most mobile and productive. They are the most likely to leave the country and the most likely to start their own business.	Highly skilled workers are the most mobile and productive. They are the most likely to leave the country and the most likely to start their own business.	Highly skilled workers are the most mobile and productive. They are the most likely to leave the country and the most likely to start their own business.	Highly skilled workers are the most mobile and productive. They are the most likely to leave the country and the most likely to start their own business.
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Scenarios overview

2021

Leaders unwilling to take the long view

2023

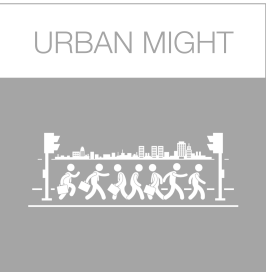
UK employees unwilling to return to the workplace

2024

Transactional power shifts to knowledge workers

2051

Physical offices are transformed



The UK is globally competitive.
High value workers prefer
remote working.



Employers were not happy and resisted demands for a return to full homeworking. Employees responded swiftly and effectively. The companies blacklist - those employers who were unwilling to change - was made publicly available on changetherules.uk.

And knowledge workers began leaving their intransigent employers in droves. Some joined other companies; most set up on their own.

It was a watershed moment. Knowledge workers could have chosen not to rock the boat and to return to the world of work that existed before covid-19, but they didn't. They demanded better.

They could have chosen to exploit their knowledge and talent until it was all used up, but they didn't. They refreshed their skills and reinvented themselves continuously.

They could have waited for someone to tell them what to do next, but they didn't. They took charge of their own destiny.

Many large employers sat back and waited for the experiment to fail. Many of those employers are still waiting. Many are no longer trading.

From bust to boomer

Not everyone, of course, was an employee in the mid 2020s.

Despite the relatively short life of the pandemic - covid-19 infections were under control globally by 2024 - it caused long-term economic damage to the world economy and significant loss of businesses. The UK, an early and enthusiastic adopter of the covid-19 vaccine, was one of the first western countries to come out of lockdown permanently but did so with a significant rise in unemployment and business closures.

Tourism, hospitality and education were particularly badly hit in those early days and remained in the doldrums for a number of years as consumers remained cautious about the future, unwilling to borrow large sums to go to university and keener to save for a difficult day than to spend.

There was a new consciousness abroad - that the world was in this together and that the better off had to look after the less well off. Not everyone agreed with the second part of that sentiment, of course. Some members of the G20 were remarkably reluctant to put aside the sustained growth policies that - in their eyes - would lift all boats over time and replace it with an approach to sustained wellbeing that would redistribute wealth more immediately. The 2025 Summit was difficult and created fractures that still remain 25 years on.

UK society also fractured. Older, wealthier citizens were anxious about their pensions and how much of their equity was tied up in real estate; they wanted strong markets. Those in their 40s - whether currently employed or not - had young families, ageing parents and higher mortgage payments than they could afford and were concerned their inheritance was going to be spent before they could get it to pay off the debts that had mounted during the pandemic. They wanted a bigger share of the pot, not less.

The under 30s didn't care at all because they were mostly excluded from property ownership that was - as far as they were concerned - an outdated and selfish means of wealth accrual that they were glad to consign to history. They had been disproportionately hit by the loss of economic opportunity caused by coronavirus and were fed up with their elders for failing to do anything to help them out.

[#takeourfutureback](#) was the biggest trending hashtag in the UK in 2027 and summed up the attitude of under 30s across the UK and beyond who wanted to put covid-19 behind them and get on with life. They wanted to do it on their own terms, rather than anyone else's and they wanted to reinvent the world of work as part of that. So, rather than try the same old jobs that their parents had done, they tried to build something different and something new - a lifestyle based approach to work that prioritised the needs of the individual rather than her boss.

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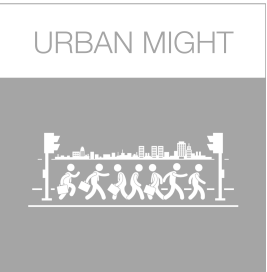
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High quality, sustainable living in the heart of vibrant and growing cities	Employers and workers embrace the world of full-time working and the benefits of a vibrant and growing city	High quality, sustainable living in the heart of vibrant and growing cities	Employers and workers embrace the world of full-time working and the benefits of a vibrant and growing city
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Scenarios overview

2021	2023	2024	2026	2027
Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work

2051
Physical offices are transformed



The UK is globally competitive.
High value workers prefer
remote working.

The boomer business model celebrated short term projects that paid well and allowed time out for friends, family and fun. Those under 30s (the first wave of whom are today approaching retirement age) brought a new sensibility to UK society as it sought to recover from the pandemic. Freed from the constraints of home ownership, empowered by their ability to exploit technology and glad to work alongside the burgeoning group of tech entrepreneurs, they drove the UK's recovery forward.

Technocracy rules

The UK has always been its best when its back is against the wall; and so it proved in the late 2020s when its newly liberated knowledge entrepreneurs and enfranchised 30-somethings began to work their magic.

That first generation of liberated knowledge workers had big ambitions from the off. Their intent was to provide key technology and innovation services across the full range of foreign markets that were open to them - and even, occasionally and perilously, some that were not. The successful knowledge microbusinesses of the early 2030s focussed on those markets and built relationships where they could. The keys to success were nimbleness, adaptability, and technological know how and there was plenty of work available for businesses with those attributes. Those who did well soon moved off the kitchen table and into the spare room; then after a while, into a larger house with dedicated office space.

Their success was accelerated by the continuous and intensive developments in online communication and collaboration tools and VR apps that were essential for any ambitious business. Client productivity rose steadily throughout the decade as meetings were run more effectively, better decisions were facilitated more quickly and strategic insights were delivered consistently. Business travel remained an essential (if infrequent) requirement, but the amount of business downtime resulting from it fell dramatically.

The 2030s were a decade of consistent growth for the UK's knowledge facilitation sector. [UKnow.cloud](#), the sector platform, was the business site with most global traffic for three years running. By 2037, Knowledge facilitation - which had been classified under 'Miscellaneous Business Services' until 2032 - accounted for 68% of the UK's exported services. By 2039, it accounted for 52% of all exports.

Dispersal and aggregation

The 2030s were also the decade that saw one of the most counterintuitive trends of the modern era - the aggregation of Britain's most successful, virtual and proudly homebased business sectors around the UK's most desirable physical locations. Places such as Frome, Amersham, Charlbury, Cleddau Estuary, Earlsdon, Tynemouth, North Berwick, Inverness and Strangford Lough enjoyed a steady influx of knowledge entrepreneurs and, after a few years, found that they themselves had become hubs. Aspiring entrepreneurs moved as close to these areas as they could, creating a halo effect that locals welcomed and resented in almost equal measure.

Aside from the social impact, the trend created opportunities. Not the least of these was the potential for developing shared living and working communities for the tech wannabees who wanted to hang out near their heroes and join the revolution. The shared housing sector has grown significantly over the last decade and has become dominated by those industry leaders who spotted the trend early and were able to free themselves from urban based portfolios that had been in decline ever since the mid 20s. Mostly, these developers moved into the UK from Europe and the US, but a few UK businesses have flown the flag and done very well indeed, thank you.

Time to care

That the UK's economy evolved at the same time as the developed economies stepped back from excessive consumption was hardly a coincidence. The 20s were marked by the sustained struggle to achieve sustainable behaviours throughout society.



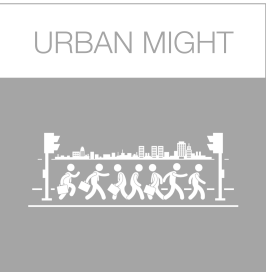
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URBAN MIGHT	URBAN FLIGHT	URBAN FLIGHT	URBAN LITE
Highly skilled workers are attracted to the UK by the high quality of life and the high quality of the public services.	Highly skilled workers are attracted to the UK by the high quality of life and the high quality of the public services.	Highly skilled workers are attracted to the UK by the high quality of life and the high quality of the public services.	Highly skilled workers are attracted to the UK by the high quality of life and the high quality of the public services.
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Scenarios overview

2021	2023	2024	2026	2027	2036	2039	2051
Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work	Knowledge workers disperse throughout the UK	Knowledge facilitation achieves 52% of UK exports	Physical offices are transformed



The UK is globally competitive.
High value workers prefer
remote working.



As the economic and social turbulence of the 20s gave way to the economic transformation of the 30s, the environmental changes required to give the world a fighting chance of a future achieved critical mass. Low carbon living formed an integral part of the new approach to business and as the environmentally demanding Gen- α s came of age, practice improved dramatically. So did legislative frameworks, helped by a collaborative approach between nations and between regulators and regulated. Everyone wanted - and in many cases - urgently needed the same thing.

The (unsnappily named) Science and Environmental Targets for Transforming Life on Earth (SETTLE) established the international boundaries for resource use and emissions that are critical for long term recovery. Today, every nation is signed up and the global effort is making significant headway. Societies consume resources at the rate at which they can be replenished; global ecosystem services are recognised and valued; full life-cycle and ecological resource assessments are mandatory for all new products; and everyone has, and knows, their carbon quota and daily spend. AI, sensortech and data analytics have led to major breakthroughs in planetary health monitoring.

UK society is adapting its behaviours in line with SETTLE policies and the green economy is a growing source of work. Some of this - R&D, software management, for example - remains urban based, but much of it takes places in centres of production.

There's nothing quite like a shared problem to bring people together and SETTLE has opened borders - both literal and metaphorical - between nations. For the moment at least, the global pursuit of the solution to a clear and present danger is supporting an era of shared technological innovation and cultural exploration.

The platform for growth

And what of the under 30s who wanted to take back their future? Well, they did. Spectacularly. Where the knowledge entrepreneurs were the facilitators of British industry's transformation, the once disenfranchised boomers were the cultural architects who created the networks and infrastructure for the knowmadic lifestyle. Knowmads - the new generation of knowledge workers who are not tied to any office or fixed location and who travel the world as they see fit - have a work-life balance on steroids. They invest heavily in the tech they need to stay connected to clients (or increasingly to employers) and they are measured on the quality of their outputs, not the hours required as inputs. They travel to locations that they like and stay in them for as long as they want before they move on.

Competition to attract Knowmads has become intense in the last decade. Early players - Dubai, Mexico, Bali, the Caribbean - remain on the map and is popular with younger knowmads but the more seasoned (and higher value creators) prefer the UK. They come here more often, stay for longer and contribute more to local society. They are attracted by the blend of landscape and culture, by the milieu of innovation and enterprise, and critically by the plethora of bespoke housing solutions - infrastructure known colloquially as 'tents' - available to them.

Tents are big business and the brainchild of boomers who were looking for a value proposition that reflected their own value set. They evolved out of the platform businesses of the early 20s, but differed in three ways: they stayed underground in the early days and were too hip to market themselves or be 'commercial'; they provided high quality connectivity and quirky, distinctive design that assimilated local culture perfectly; and they were infinitely flexible. Knowmads can buy short stays, single country membership, global membership or - the gold standard - lifetime membership to the global network. The extraordinary trick that the boomers have pulled off is creating a counter culture that is mainstream and commercially successful - without appearing to be. Nothing says it better than the knowmad mantra, coined in London: *Drop in. Log in. Connect.*

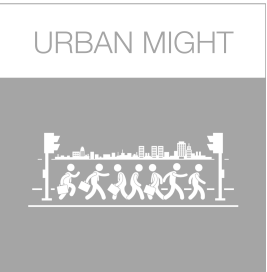
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URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High quality, globally competitive, low carbon living and high value workers.	High quality, globally competitive, low carbon living and high value workers.	High quality, globally competitive, low carbon living and high value workers.	High quality, globally competitive, low carbon living and high value workers.
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Scenarios overview

2021	2023	2024	2026	2027	2036	2039	2042	2045	2051
Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work	Knowledge workers disperse throughout the UK	Knowledge facilitation achieves 52% of UK exports	World delivers effective environmental change	UK a favoured destination for knowmads	Physical offices are transformed



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remote working.

Higher education

It's an uncertain time for Britain's universities. The sector is both smaller and more intensely competitive than it was a generation ago and, while it remains strong in research overall, it has lost ground in some key technologies such as AI, data analytics and sensor technology. Perhaps more importantly, HE is no longer seen as a primary channel to getting a good job. This is for two reasons.

Firstly, the knowledge creators, platform builders and knowmads have generally gone directly into the workplace without attending university - institutions that they (rightly) regard as part of the old establishment and old values that have little place in today's transformed working environment. Secondly, universities have themselves been slow to change. The FE sector has been much more nimble in adapting to the needs of the new economy but HE has reinforced that age old trop of being an ivory tower (aka irrelevant).

The UK situation is not mirrored elsewhere. English is now the universal language of education across the world and that means that the leading institutions are those which offer tailored, relevant and flexible learning process that deliver appropriate content. Mostly, 'appropriate' refers to vocational courses

The UK does, however, enjoy a reputation for postgraduate education and research and - building on the UK's strong reputation in the knowmad community - is seen by some as a low barrier entry channel. Mostly this is in the sciences. What business schools remain are independent and primarily focussed on public sector employees. There is little call for business theory in the growth areas.

Research value comes from collaborative ventures to address global problems and UK universities remain well connected. Local uptake of research ideas is not always guaranteed, though, and depends on local infrastructure and policy interests.

No wonder, perhaps, that some UK universities are therefore considering withdrawing from undergraduate teaching completely. It's a radical - and high risk solution - to a challenging problem. If they pursue it, the sector will only shrink further. To the winners go the spoils.

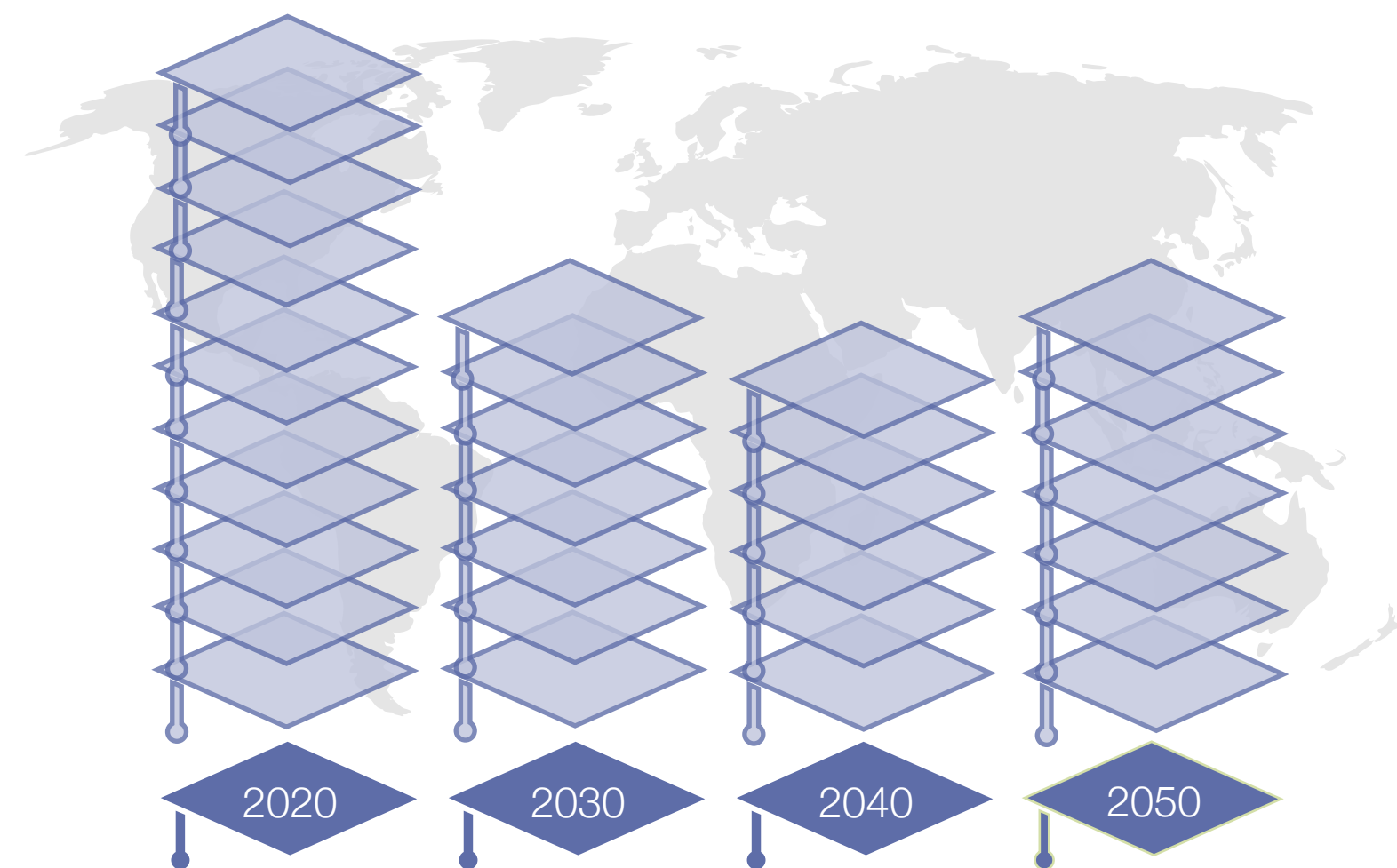
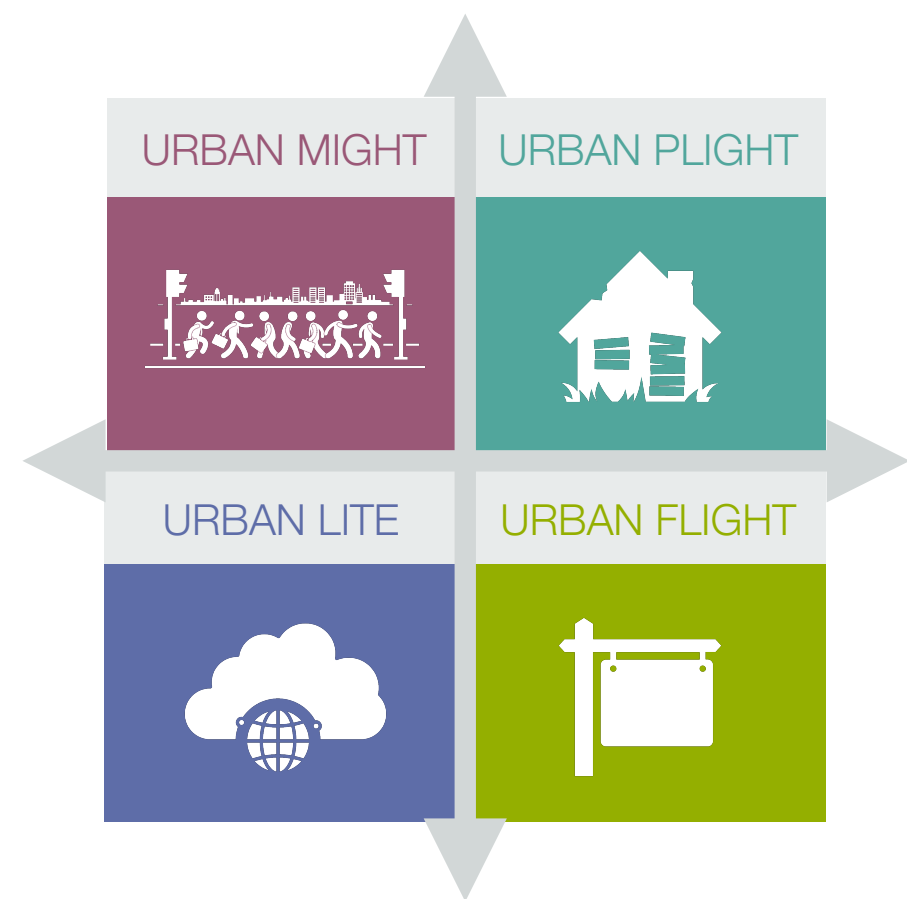
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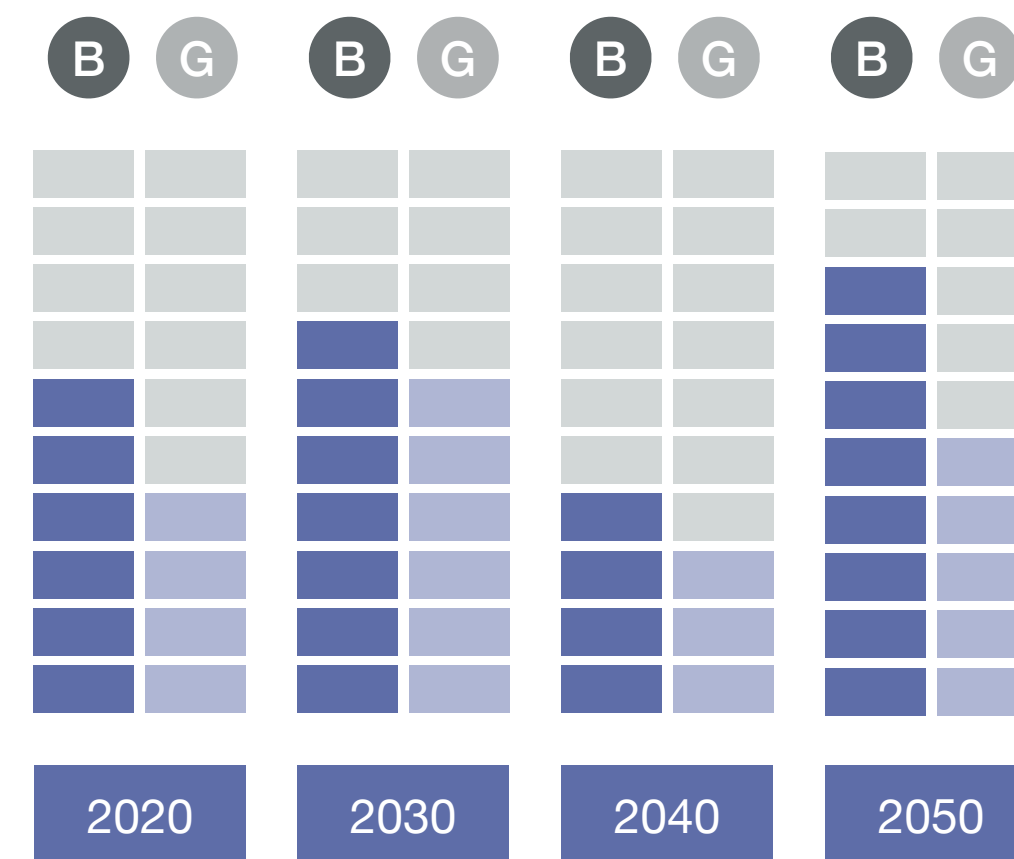
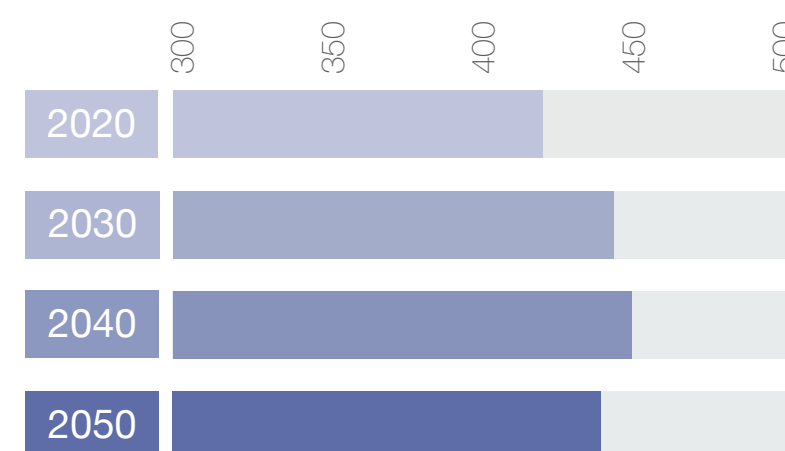
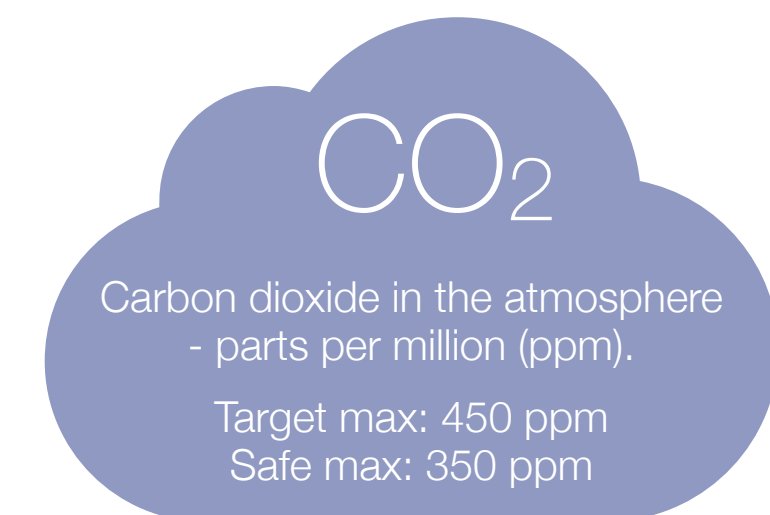
URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
Highly skilled workforce The world's most competitive and productive workforce	Highly skilled workforce The world's most competitive and productive workforce	Highly skilled workforce The world's most competitive and productive workforce	Highly skilled workforce The world's most competitive and productive workforce
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Scenarios overview

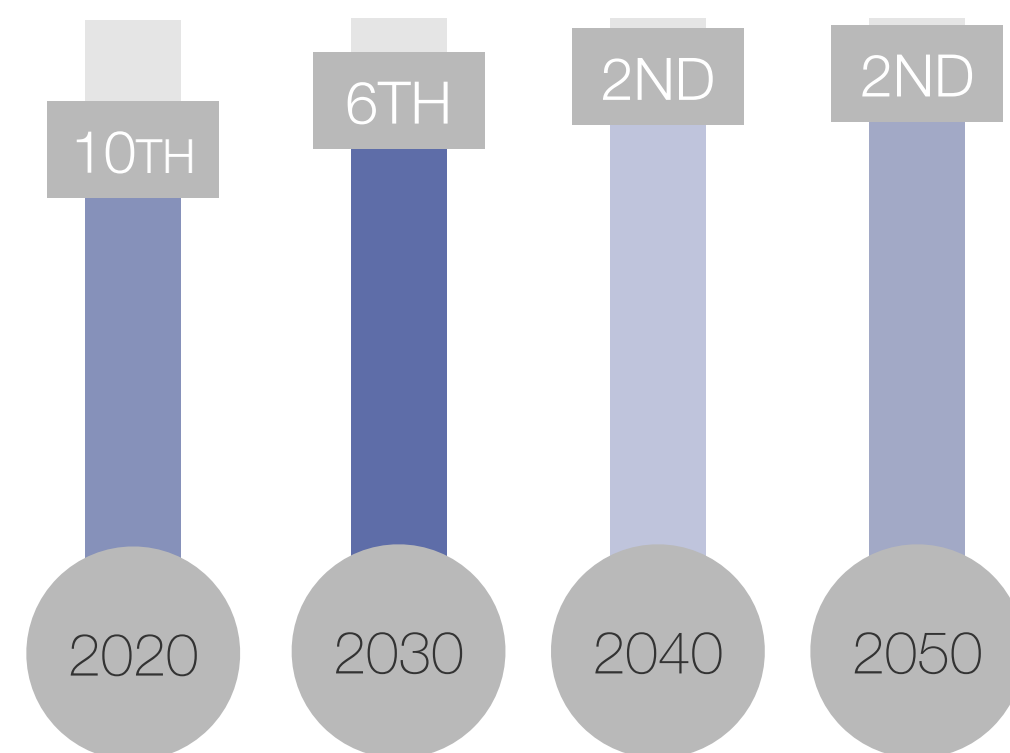
2021	2023	2024	2026	2027	2036	2039	2042	2045	2048	2051
Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work	Knowledge workers disperse throughout the UK	Knowledge facilitation achieves 52% of UK exports	World delivers effective environmental change	UK a favoured destination for knowmads	UK HE struggling to modernise	Physical offices are transformed



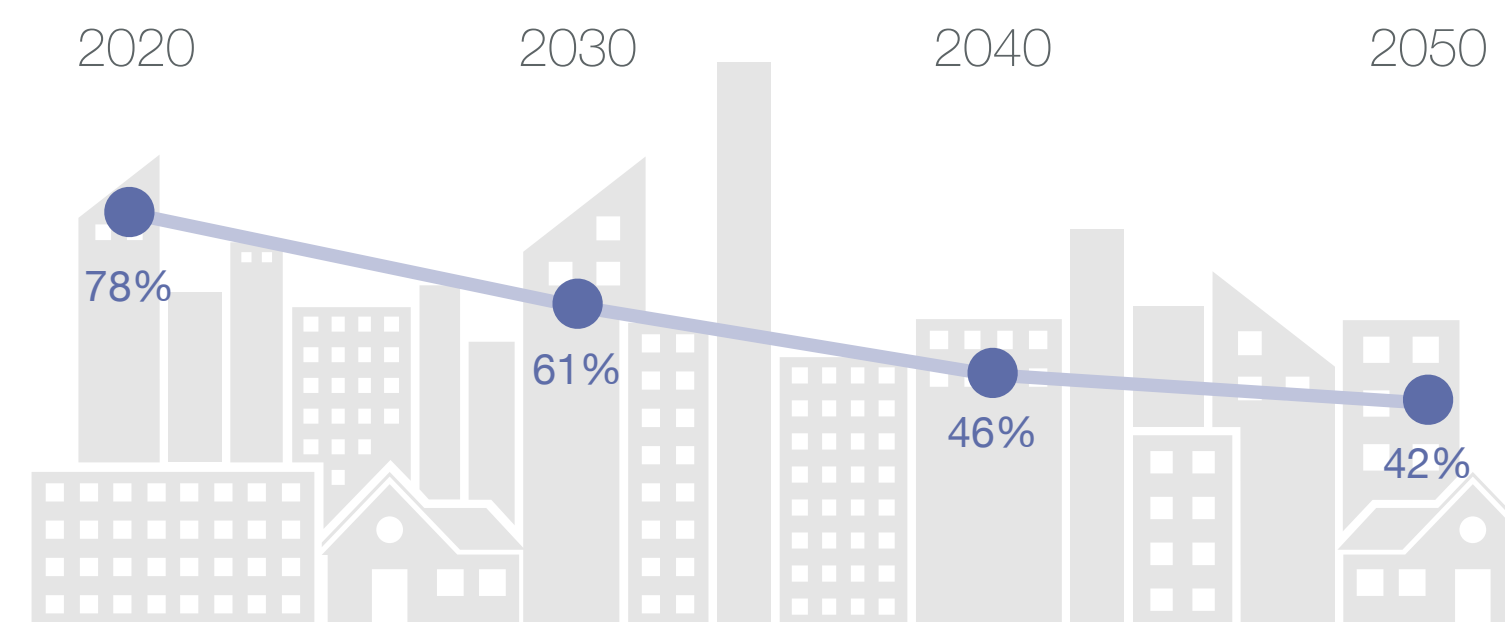
UK UNIVERSITIES IN GLOBAL TOP 100



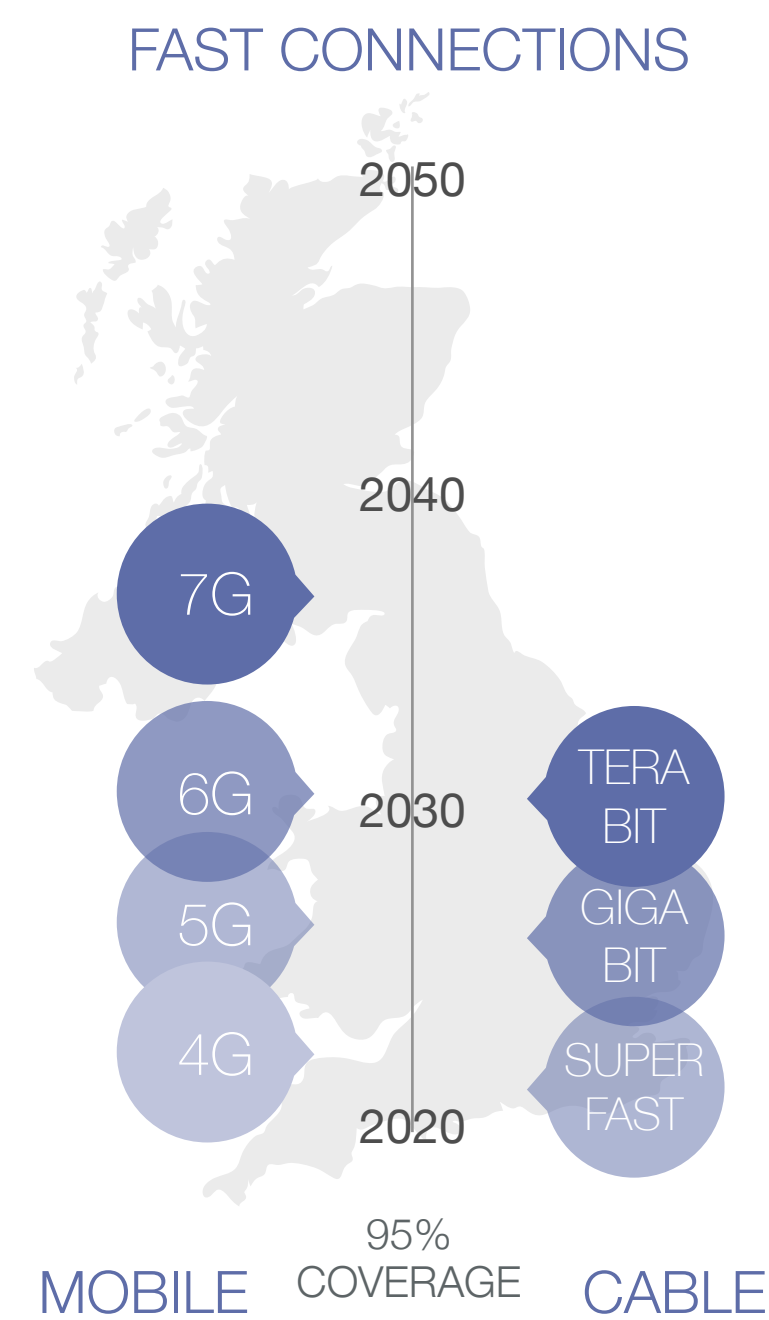
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BUSINESS AND GOVERNMENT



GLOBAL INNOVATION RANKING - UK



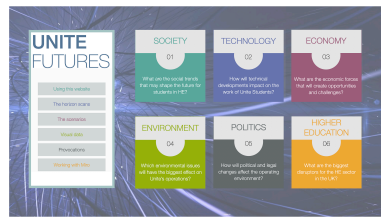
FTSE 350 STAFF WORKING IN CITY CENTRE OFFICES



MOBILE COVERAGE CABLE

URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
High density, vibrant living, the heart of urban and economic growth.	Medium density, vibrant living, the heart of urban and economic growth.	Low density, vibrant living, the heart of urban and economic growth.	Very low density, vibrant living, the heart of urban and economic growth.
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Scenarios overview



Scanning microsite



The UK is globally competitive.
High value workers prefer
remote working.



<div>NEXT-GEN</div> <div>Smart and tech-savvy, Gen Alpha have grown up with recession, a pandemic and a threatened world.</div>	<div>KEEPING HUMANS IN THE LOOP</div> <div>AI is helping the San Diego economy by creating more jobs, not eliminating them</div>	<div>INDUSTRY 4.0</div> <div>New technologies and changing consumer demand is driving huge disruption across many industries.</div>	<div>FLEXIBLE DESIGNS</div> <div>Buildings which can flex their use of time offer better financial and environmental returns.</div>	<div>X MARKS THE SPOT</div> <div>Keeping young people engaged in politics may require some innovation in voting and registration</div>	<div>INTENTIONAL LEARNING</div> <div>The world of stable lifetime employment has faded in the rearview mirror. Intentional learning is the way forwards</div>	<div>ALTERNATIVE CREDENTIALS</div> <div>The key to making higher education reach non-traditional groups who need to up-skill or reskill</div>
<div>SOCIAL MOBILITY</div> <div>Family situations still has a major influence on social mobility and will hold back many from achieving their potential.</div>	<div>TECHNOLOGY CARES</div> <div>A range of technology to support elders who want to continue living at home instead of moving into nursing homes</div>	<div>DO YOUR HOMEWORK</div> <div>Even after the pandemic many people will choose to work from home</div>	<div>BUILDING INNOVATIONS</div> <div>The leading edge of green construction technologies could transform future buildings.</div>	<div>UK NATIONAL DATA STRATEGY</div> <div>How government can boost better use of data by businesses, government, civil society and individuals</div>	<div>CLOSURES...?</div> <div>Some existing universities should be closed down and new ones be established to save the HE sector</div>	<div>TOO MANY GRADUATES</div> <div>42% of the core skills required to perform existing jobs will have changed by 2022</div>
<div>THE ACTIVE CITIZEN</div> <div>Young people are just as likely to be engaged with their community or with politics - but in different ways.</div>	<div>THE HYDROGEN ECONOMY</div> <div>Government will work with industry to evaluate hydrogen as an option for heating homes and workplaces</div>	<div>JOB OF TOMORROW</div> <div>New jobs will require constant retraining and are likely to require a mix of technical and soft skills.</div>	<div>CLIMATE OPINION</div> <div>Public opinion matters. Increasing numbers of people believe there should be urgent action in response to climate change.</div>	<div>PLANNING AHEAD</div> <div>Government's new approach to planning will see easier permitted developments and up front protection for the environment</div>	<div>MERGERS...?</div> <div>A strategic restructuring of further and higher education?</div>	
<div>CO-LIVING</div> <div>How will people choose to live together? Is co-living a flash in the pan or here to stay?</div>	<div>THE AI SKILLS GAP</div> <div>New research by Microsoft reveals that the UK has lower AI maturity, adoption levels and workforce skills than its competitors</div>		<div>BUILD BACK GREENER</div> <div>Can greener regeneration and construction be part of the post-Covid dividend?</div>	<div>LEVELLING UP R&D</div> <div>The UK R&D Place Strategy will set out how Government will invest research and innovation in places around the UK</div>	<div>LEADING PURPOSEFULLY</div> <div>The digital workforce expect digital transformation to better reflect their concerns and values, not just boost market opportunities</div>	

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Next

URBAN MIGHT	URBAN PLIGHT	URBAN FLIGHT	URBAN LITE
How likely is it that the UK will be a global leader in the world of the future?	How likely is it that the UK will be a global leader in the world of the future?	How likely is it that the UK will be a global leader in the world of the future?	How likely is it that the UK will be a global leader in the world of the future?
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Scenarios overview

2021	2023	2024	2026	2027	2036	2039	2042	2045	2048	2051
Leaders unwilling to take the long view	UK employees unwilling to return to the workplace	Transactional power shifts to knowledge workers	UK permanently out of lockdown	Under 30s redefine the future of work	Knowledge workers disperse throughout the UK	Knowledge facilitation achieves 52% of UK exports	World delivers effective environmental change	UK a favoured destination for knowmads	UK HE struggling to modernise	Physical offices are transformed