



ASSOCIAZIONE

GIANROBERTO  
CASALEGGIO

## **NOTHING WILL EVER BE THE SAME AGAIN**

Italy after the Corona virus:  
predictions on how our future will change.

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# INTRODUCTION

In order to be able to make any sense at all of this complex, volatile and uncertain world that we're living in these days, Gianroberto Casaleggio would have urged us not to take anything for granted and to come up with new ideas and new ways to view reality by combining knowledge and imagination.

His invitation to us to "Understand the future" is truer today than ever before. It is also one of the most important things we can do right now, given that it is we who will have to learn to live with the Corona virus and not the other way around.

The pandemic has speeded up a number of the changes currently already in progress and has indeed brought about a number of entirely new ones. For example, the consolidated mega-trends that envisaged our cities becoming ever more heavily populated at the expense of the smaller centres will now have to be re-thought. In certain cases, the current trends are in fact speeding up. Indeed, nowadays it's become much easier to imagine an entirely touchless society that will go well beyond gesture or voice commands and cashless payment, or even "homeisation", a term coined to describe the growing trend towards being able to do everything from home thanks to digital technology. From home schooling to watching movies on Netflix, from working in an office to Smart Working from home and from going to the gym to exercising at home were already a fact of life and all that Covid-19 has done is to speed up the change process.

The experts tell us that we'll have to get used to the idea of living with the virus for a number of months or years to come. This is why we need to seriously ask ourselves what the future may hold in store for us, looking beyond our immediate needs and current affairs.

What the history books don't talk about is that feeling of uncertainty that hits people when they're going through a crisis. The world will undoubtedly be a very different place after the Corona virus, but how? Will everything go back to what it was before, or will the changes be radical and irreversible?

It's extremely hard to imagine what our world might be like ten years from now, not only

due to the changes, but also due to the consequences and after-effects, be they intentional or otherwise.

It may well be impossible for us to predict the future, but what we absolutely must do is think about possible future scenarios and prepare ourselves to deal with whatever eventualities do arise. Foresight expert John Smart maintains that: "Part of our future seems to be evolutionary and unpredictable in nature while other parts seem to be developmental and predictable. The challenge for us all is to invent the former and discover the latter", which is why we need new ideas, new scenarios and new ways of thinking that somehow manage to shed light where currently there is little else than total darkness.

While it's undeniably true that the world was caught totally unawares by the pandemic, one thing we can bet on is that we will try everything in our power to learn the lessons that the pandemic has taught us. We know that technology has historically been one of man's closest allies, but we cannot even imagine the extent of the role that digital technology is going to play over the next 10, 20 or 50 years. We can however get an inkling by looking back and imagining what the worldwide impact of Covid-19 and the lockdown might have been just 15 years ago, without smartphones, instant messaging, broadband, smart working, online streaming and with no widespread and ultra-efficient e-commerce.

The exponentially increasing speed at which technology is evolving has highlighted just how unprepared we really are. We don't yet have the necessary cultural, ethical, philosophical and psychological wherewithal to be able to deal with it. On the other hand, man will be simply unable to resist the temptation to utilise technology to the best of human ability. Innovation and business have no intention whatsoever of waiting around patiently for our cultural and philosophical processes to eventually catch up. According to Bauman, changes are happening so quickly that by the time we manage to grasp the essence of a change, it's already outdated. The challenge for us is to turn this difficulty into something that spurs us on to ask ourselves more questions.

It is precisely this kind of spirit that has driven our Association to decide to forge ahead with

# INTRODUCTION

Gianroberto Casaleggio's ideas and to organise an annual event in Ivrea entitled "SUM - Capire il Futuro" (literally - "SUM – Understanding the future"), the past three editions of which have involved a variety of opinion leaders, experts and visionaries from every corner of the world, as well as thousands of participants who came to listen to what they had to say.

This year, the Corona virus emergency has prevented us from publically remembering Gianroberto and his ideas by hosting a fourth annual edition of the "SUM". So we thought that the best way for us to "Understand the future" in such difficult times would be by means of collective intelligence, namely by pooling various ideas and multi-disciplinary skills.

We therefore asked the members of our Association to put forward the names of experts and visionaries that we could potentially involve in a common purpose, with the aim of reflecting on two important issues that would undeniably have captured Gianroberto's attention: the forecasts of irreversible changes that the Corona virus will make to people's lives and the choices that Italy should make in order to become a major role-player in the future and restore its self-esteem as a Country.

To lay a foundation on which to plan for the future and starting from our submissions from our members, we approached 35 people with a great vision and extensive experience, including a number of speakers from our previous "SUM" events. The end result of this collective intelligence is represented by this document, which reveals a rich tapestry of multi-disciplinary reflections of individuals, all experts in a various different fields, ranging from corporate managers to sociologists, from virologists to intellectuals and from entrepreneurs to medical practitioners.

Clearly, one common factor that links the people that kindly agreed to participate, and that is also important to highlight, is their common interest in the future rather than their political affiliation.

All of the experts that we involved followed a two-stage process, borrowed from Delphi

technique, whereby they first answered questions put to them by the Gianroberto Casaleggio Association and then they were called upon to explain whether they personally agreed or disagreed with the answers given by the other experts, but without knowing precisely who gave which answer.

The end-result of the exercise are the 10 main predictions on which the majority of the experts was in agreement and, on the other hand, the 10 topics on which the expert opinions were divided, ranging from strong agreement to total disagreement.

The former 10 predictions are quite probably representative of the kind of future in which we will find ourselves over the next few years. The latter 10, instead, which we classified as "controversial", are ideas that we believe are worth reflecting on even though they may be much less likely to come true.

The transformation of society and, above all, reflections on future scenarios are seldom if ever the hot topics of discussion on the politicians' or journalists' agenda. Yet we are certain that, in changing times such as those that we are currently living in, it would be an error to limit ourselves to looking into the future with the eyes of the past and to stop at current affairs. In a world in which the rate of evolution in digital technology is speeding up day by day, it would be somewhat restrictive to attempt to answer new questions using reasoning, ideas and concepts that date back centuries. If ever there was an ideal time to question the certainties of our modern society, then that time is now.

Our aim is obviously not to attempt to predict the future, but rather to get as many people as possible to question themselves differently and to look into the future with a long-term, open minded perspective. We do this with the conviction that the best possible outcome for our readers would be for them to be able to put into practice Gianroberto's heart-felt idea that the best way to predict the future is to invent it yourself.

Maurizio Benzi  
*Secretary of the Gianroberto Casaleggio Association*

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Meaning, willpower and imagination are three powerful talismans that everyone has in their possession; they are usually latent, but they are there nevertheless, entirely at our disposal. With these we are able to create a new reality that seemed impossible.

*Gianroberto Casaleggio, 1999*

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The Gianroberto Casaleggio Association promotes cultural, social, digital, artistic and recreational activities that contribute to the cultural growth of its members, the development of free and independent debate on the future of mankind, all of the various types of communication, human, social and entrepreneurial relations and the creation of a cultural and connectivity network, in accordance with the spirit of the principles that have always guided the thoughts and actions of Gianroberto Casaleggio.

The Association, founded on 14 February 2017, is a non-profit organisation and is only able to continue its work thanks to voluntary donations and subscriptions.

To register as a subscriber, go to

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Email: [sum@gianrobertocasaleggio.com](mailto:sum@gianrobertocasaleggio.com)



## THE EXPERT PARTICIPANTS

Herewith is a list of the 36 experts in various different fields that we called upon and who agreed to share their ideas for this project, giving freely of their time and knowledge:

**Father Paolo Benanti, Theologian and Professor.**

Member of the Third Secular Order of St. Francis, his field of expertise includes ethics, bioethics and technology ethics.

**Franco Bernabè, Manager and businessman.**

Successful corporate director and former head of Eni and Telecom. Since 2016 he has been President of UNESCO's Italian National Commission.

**Matteo Bonelli, Attorney.**

Partner at Bonelli Erede and renowned expert in the field of Corporate and Real-Estate Law.

**Francesco Caio, Manager.**

Successful Manager. After heading up various companies including Avio and Poste Italiane, he is now Chairman of the Saipem Board of Directors.

**Gianmauro Calafiore, Entrepreneur.**

Successful entrepreneur with an in-depth knowledge of digital technology, he founded the San Francisco-based Loop AI Labs, a leader in the field of Artificial Intelligence. He previously participated in SUM#02.

**Andrea Cardamone, Manager and Entrepreneur.**

A highly experienced Manager, innovator and change-management expert, particularly in the Banking sector.

**Barbara Carfagna, RAI Journalist.**

Presenter of the television news programme Tg1. She is an expert in the field of digital technology and technologically advanced companies, as well as scriptwriter and presenter of the Rai1 television programme "Codice, la vita è digitale". She previously chaired SUM#03.

**Innocenzo Cipolletta, Manager and Economist.**

Successful Manager and former General Manager of Confindustria and former President of the Sole 24 ORE daily and the National Railways Company. As an economics expert,

he now heads up the Italian Private Equity, Venture Capital and Private Debt Association and is also President of Assonime.

**David Corsini, Businessman and Manager.**

CEO of Danieli Telerobot and expert in the field of industrial engineering and robotics. He previously participated in SUM#01.

**Mariano Corso, Professor.**

Lecturer at the Milan Polytechnic and an expert in the field of leadership and innovation, he is Scientific Manager for the Smart Working and Cloud Transformation Observatories.

**Roberto Costantini, Manager and author.**

Director of the Guido Carli Free International University for Social Studies, lecturer in Business Administration and author of best-seller novels.

**Luca De Biase, Journalist and Professor.**

Expert in the field of new technologies, he is the founding director and editor of Nova24, the technology insert of the Sole24Ore daily newspaper. He has participated in all of the SUM events held to date.

**Beniamino de' Liguori Carino, Manager.**

General Secretary of the Adriano Olivetti Foundation, Vice-President of the Olivetti Historical Archives Association and Editorial Director of Edizioni di Comunità. He previously participated in SUM#01.

**Derrick de Kerckhove, Sociologist and Professor.**

World renowned expert in the field of digital culture and author of numerous essays. He is Scientific Director for Media Duemila and the TuttiMedia Observatory. He was a speaker at SUM#03.

**Domenico De Masi, Sociologist and Professor.**

Emeritus Professor of Industrial Sociology at Rome's "La Sapienza" University, where he formerly held the post of Dean of the Faculty of Communication Sciences. He has also written numerous essays and previously participated in SUM#01 and SUM#02.

**Valerio De Molli, Entrepreneur and Manager.**

Managing Partner and Managing Director of The European House – Ambrosetti,

## THE EXPERT PARTICIPANTS

expert in the field of management and member of the Board of Directors of numerous companies.

### **Massimo Di Felice, Sociologist and Professor.**

Lecturer at the São Paulo University and founder and Director of the International Research Centre for Atopos digital networks. He previously participated in SUM#02

### **Francesco Erspamer, Professor.**

Lecturer in Romantic Literature at Harvard University. Expert in the field of cultural transformation, particularly during the Eighteen and Nineteen Hundreds through to modern times.

### **Andrea Faragalli Zenobi, Manager.**

Successful corporate manager, expert in the field of management and former President of Italo.

### **Massimo Fini, Author and Intellectual.**

Unconventional author who has become a point of reference for cultural anti-conformists. He previously participated in SUM#01 and SUM#03

### **Luca Josi, Manager.**

Brand Strategy and Media Manager for TIM.

### **Daniele Manca, Journalist.**

Deputy Editor of the Corriere della Sera daily newspaper and expert in the fields of economics, the digital world, politics, sociology and communications.

### **Luca Mercalli, Climatologist and Science Journalist.**

Heads up the Italian Meteorological Society, as well as Editor of the Nimbus Magazine and Lecturer in Environmental Sustainability.

### **Giorgio Metta, Scientist and Professor.**

Science Director of the Italian Institute of Technology (IIT). Formerly Professor of Cognitive Robotics at the University of Plymouth. He previously participated in SUM#01.

### **Salvo Mizzi, Manager Kauffman Fellow.**

Amongst the original pioneers of the Internet in Italy, he is an expert in the field of digital innovation and investment. He formerly headed up TIM Ventures and Invitalia Ventures.

### **Roberto Poli, Sociologist and Professor.**

UNESCO chair for anticipatory Systems. Heads up the Master Course in Social Forecasting. President of the AFI (the Association of Italian Futurists) and Skopìa. He was previously a speaker at SUM#02.

### **Carlo Petrini, Gourmet and Sociologist.**

Expert in the field of food and agriculture, he is also the founder of the Slow Food Association.

### **Chiara Rostagno, Architect and Professor.**

Former Director of the Cenacolo Vinciano National Museum and Lecturer in Art Restoration Techniques at the Milan Polytechnic. He previously participated in SUM#02.

### **Guido Scorza, Professor and Attorney.**

One of Italy's top experts in New Technology Law, a field in which he has been involved for over twenty years.

### **Guido Silvestri, Medical Practitioner and Virologist.**

Full Professor and Head of Pathology Department at Emory University in Atlanta, as well as Director of the Microbiology and Immunology Division at the Yerkes Center. Editor of the Journal of Virology.

### **Valerio Tacchini, Notary.**

Successful Notary and expert in the field of innovation.

The following participants requested that their names be withheld:

*Venture Capitalist and Entrepreneur*

*G.C. – Medical Practitioner and Professor*

*Entrepreneur and expert in the field of healthcare economics*

*Intellectual and expert in the field of culture*

*Manager of a major international technology company*

Obviously the summarised predictions and assessments contained in this document represent a general overview of what was discussed and are not necessarily the respective, and in some cases very different personal opinions of the individual experts.



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# THE IRREVERSIBLE CHANGES IN PEOPLE'S LIVES

# THE IRREVERSIBLE CHANGES IN PEOPLE'S LIVES:

10 main points



1

Smart Working:  
rearranging of jobs around  
different times and places



2

Consumption:  
how digital technology  
transforms the retail market



3

The Touchless Society



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Smart mobility:  
from the public transport  
crisis to de-urbanisation



5

The challenge of the  
"Newly poor"



6

The search for balance  
between privacy and  
control



7

Centralisation vs. delocalisation  
of healthcare:  
home care vs. hospital care



8

A new education paradigm



9

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the digital sector: the new  
proxemics



10

A more resilient supply  
chain



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# 1 SMART WORKING:

rearranging of jobs around different times and places

# 1 SMART WORKING:

rearranging of jobs around different times and places

Smart working is undoubtedly one of the key slogans of 2020. The global social distancing measures that are part of the attempts being made to slow the spread of Covid-19 have, in fact, speeded up the process of adoption of alternative remote working arrangements. However, the re-arranging of tasks on the basis of dematerialised information flows and the abandoning of set working hours in favour of results-based performance is not simply a matter of changing the work format and work method, but rather a major overhaul of the way in which we set objectives and provide the necessary tools with which to achieve them.

The trend towards employees doing their jobs from home instead of going into their offices is unlikely to change anytime soon. As at the end of 2019, in Italy alone, over half a million people were working remotely from home, a 20% increase on the year before. When the first Government Decree came into effect on 23 February in an attempt to overcome the Corona virus epidemic, the number of remote workers in Italy at the time was already in excess of one million<sup>1</sup>, however, the potential total number of people working from home by the end of the three-month lockdown period was estimated to be as high as eight million<sup>2</sup>. The consolidation in the trend towards Smart Working will lead to obvious changes in our lifestyle, as well as in our basic conceptual understanding of what constitutes home and what constitutes the office.

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Residential homes will also become workplaces and companies will have to find a way to somehow compensate employees who agree to Smart Working arrangements. Companies will also see their production capacity dropping as a result of social distancing measures and will immediately turn to robotic automation and Artificial Intelligence as a way to get their productivity back up to earlier levels with fewer people. Is there an increased risk of a rise in unemployment, you might ask? Well yes, of course there is.

*Innocenzo Cipolletta, Manager and Economist*

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After all, Covid-19 has already resulted in the biggest global remote-working experiment ever undertaken. In China, Tencent has sent almost all of its professional personnel home to go and work remotely, as Twitter has done in the United States, which is proof that nothing will ever be the same again, in other words, no one will any longer be obliged to go into the office if they are able to complete their assigned tasks elsewhere. For the past few months already, organisations and associations, schools and training centres, as well as banks and credit and loan institutions have been exclusively dealing with the public remotely, thereby becoming the standard bearers for the term “Remotisation of operations” and making the process seem perfectly normal rather than unusual. Will we ever get back to “normality”, you ask? Well, this is the “new-normal”.

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Notwithstanding 40 years of seminars, conferences and legislative interventions, as at the first of January 2020 only 750-thousand workers were Smart Working, out of a potential total of 14 million. Under pressure from the Corona virus, in just four weeks that number shot up to 8 million. It is highly probable that once the pandemic has passed, many companies will continue to make use of Smart Working arrangements so as not to lose the by then tried and tested benefits that companies themselves, their workers and the areas in which they operate have discovered.

*Domenico De Masi, Sociologist and Professor*

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The shift from remote working to fully-fledged Smart Working will be a gradual process, but nevertheless is a logical consequence of the adoption curve that we’re already seeing today. Interaction and productivity will be closely linked to the adoption of high-tech information-sharing and collaborative-work software packages. Smart Working mechanisms will continue to develop, with an ever-decreasing need for lots of people working in offices, so we will have to re-think these spaces from an open-access and dynamic perspective.

## 1 SMART WORKING:

rearranging of jobs around different times and places

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As a result of the re-opening requirements and companies' search for corporate efficiency, the ways of working that organisations adopted as a temporary measure during the lockdown period will become a permanent systemic feature that will impact on every aspect of these organisations, from operating procedures through to organisational structures and from incentives schemes and control systems through to union representation and training programmes.

*Francesco Caio, Manager*

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There is substantive agreement between those who assume that, by working from home, each of us would gain around ten days of time each year. What we're talking about here is at least one hour of commuting time per day, times approximately 230 working days, which could be spent on whatever else we choose to do. Many service providers have realised that remote working actually works very well for them and in many cases is far more efficient too. Many companies will no longer have physical premises and, indeed, in the more densely populated areas, remote working will also help to reduce emissions and lower the risk of contracting pollution-related illnesses. It's no mere coincidence that we now use the word "Homeisation" to describe the option we now have to utilise many services from home that, until just a few months ago, we had to go to specific places to utilise. A number of platforms have made everything much simpler, for example Netflix, which has seriously cut into movie-theatre revenues, or food delivery services and online training courses. However, at a vertical level, much more is changing in some of the most unexpected market sectors, such as the Financial and Banking sector where companies are now finally putting to good use many years' worth of investment in digitalisation, which is now become fully operational and is running smoothly. One example is Digital Signature, which now enables users to attach a legally valid signature, in many cases at the European level, via their smartphone, with the kind of simplicity and versatility that was previously unimaginable.

**10 EXTRA**  
DAYS OF LIFE  
EVERY YEAR



WHAT DOES THE **FUTURE**  
LOOK LIKE FOR  
SMART WORKING IN **2030?**

While the crisis unleashed by the Corona virus has certainly speeded up the digitalisation processes in the business world, the organisations themselves have entered into an evolutionary phase from which they will never go back. By offering employees and associates greater independence and greater investment in their out-of-office lives, we build a habitat that is totally unbound from the traditional concept of time and space, where no amount of clocking in and out could ever be a substitute for obtaining results. The world of work is set to change way more over the next 10 years than it ever did in the past 50: people will be able to choose where and when to work and no one will have any need for slavish control over their daily routines. We will all become like a group of freelance entrepreneurs working in the same company. Robots, computers and machines will play an even more important role by doing the kind of manual tasks that take time away from the reasoned choices of individuals. This is already happening to a certain extent: machine learning and AI systems include system interlocks and operational shut-down facilities that enable humans to intervene only as and when necessary, thereby freeing up the human workers' time for more intellectually challenging tasks and more strategic decision-making, supported by rather than replaced by predictive software. Most probably, in 2030 we will look back and wonder how we ever managed to sit and work at a desk for eight hours a day, thinking only about knock-off time instead of focusing on the finish-line right in front of us.

# 1 SMART WORKING:

rearranging of jobs around different times and places

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An increase in the general entrepreneurial culture. In the wake of the pandemic, the resulting economic crisis and the disappearance of certain jobs will encourage new kinds of entrepreneurship based on information and on innovative digital interaction practices. The vast majority of these business activities will be informal and supported by the spread of new interaction architectures (Blockchain) and new currencies (cryptocurrencies).

*Massimo Di Felice, Sociologist and Professor*

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As a result of Remote Working, many people will gain around 10 additional days of time per year (at least 1 hour of commuting, times around 230 working days), which they can spend doing whatever else they choose to do. Many service providers have realised that utilising remote working works very well for them and in many cases is far more efficient too. Many companies will no longer have physical premises. In the more densely populated areas, remote working will also help to reduce emissions and thus lower the risk of contracting pollution-related illnesses.

*Gianmauro Calafiore, Entrepreneur*

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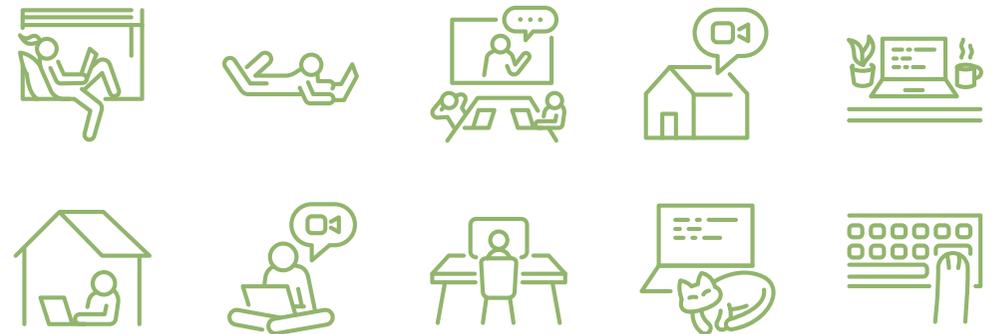


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Initially, the spread of remote working will be driven by pressure from workers, however, the undeniable cost savings for the companies will become the engine that drives a change that already appears to be unstoppable.

*Daniele Manca, Journalist*

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## 2 CONSUMPTION:

how digital technology transforms the retail market

## 2 CONSUMPTION:

how digital technology transforms the retail market

In any recession, people tend to cut down on their non-essential purchases and instead focus exclusively on essential purchases and on precautionary savings to tide them over in case the crisis should deteriorate.

What is different about what we saw as the Corona virus pandemic spread is that consumers not only cut down on the “extras”, but also cut down on expenses that are commonly deemed to be affordable even at times when people are not particularly well-off. It is estimated that somewhere between 40 and 60% of the people who chose domestic “alternatives” to eating-out will continue to do so over the next few months, thereby delaying any potential large-scale economic recovery. In Italy, as in the rest of Europe<sup>3</sup>, our predisposition to spend goes hand in hand with our level of optimism that the pandemic will indeed end at some stage.

Unlike the sales of goods such as foodstuffs, homecare products and body-care products, which continue to be totally stable, sales in other market segments will remain below national average levels for at least the next quarter. Forget about sea cruises, hotels, cinemas, jewellery and restaurants, whereas sales of cigarettes, newspapers and magazines, gym memberships, and fuel will increase bit by bit, albeit in a different manner to what they are now.

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The retail trade is set to bear the brunt of an increased consumer propensity for online purchases. This sector will also witness a major trader-consolidation process. The larger platforms will continue to grow, at the expense of the smaller operations.

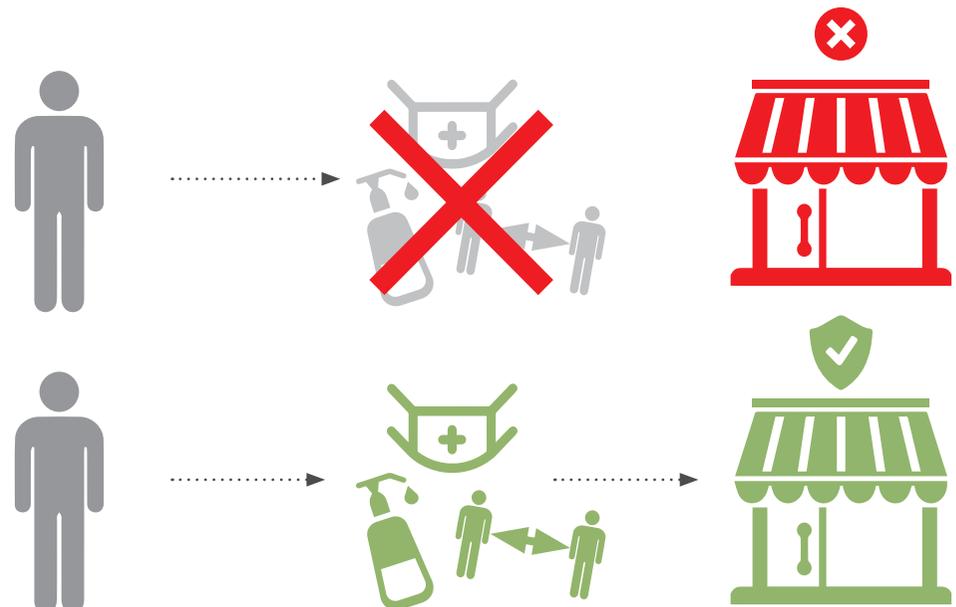
There will be a process of cutting out the middle-man in retail trading, which will in turn have a number of social and employment consequences.

*Franco Bernabè, Manager and businessman*

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As we have already seen, during the weeks of lockdown the Italians’ consumption levels were supported, at least partly, by the food delivery apps. The months spent in lockdown and the inability to go out and spend money due to the closure of the stores has reduced the propensity to consume, for at least the following two reasons. The first is that, having personally witnessed the advantages of sticking to the essentials and avoiding the superfluous, people have tended to focus more on specific kinds of goods.

The second is that, anyone who had previously purchased goods and services online, realised just how simple and fast the process actually was and the amount of time this saved them, which could instead be spent on satisfying their personal needs. Wooing back the bulk of previous consumers will be extremely difficult. As emerged from a recent survey<sup>4</sup>, 63% of Italians still want to continue purchasing from physical stores, but 68% of those will only do so once it is totally safe to do so. Traders will have to ready themselves to meet the new needs of consumers by relying on the human factor as well as on digital technology.



## 2 CONSUMPTION:

how digital technology transforms the retail market

In fact, we talk about “new consumerism” whenever we refer to the need to overcome this emergency. Making purchases on online platforms will become the so-called “new normal”, and although it will initially continue to run in parallel with traditional in-store purchasing, it is set to take over as the main purchasing method. Many people are still wary of going out in person and still have the urge to continue using the digital, touchless solutions that they have adopted in the past few months. Furthermore, according to the analysts<sup>5</sup>, Italians will no longer go to the shopping mall as much as they used to do, but will instead opt to dedicate space and time to other things and to purchase only what they really need, mainly online. Is this a revolution, or what? Absolutely yes.

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The pandemic has, for the first time ever (in generations), made us realise that we are subject to unforeseeable shocks that can cause economic meltdown. So it would be quite reasonable to expect to see an increasing propensity to save or to make prudent, easily accessible investments, amongst people whose income has been negatively affected by the lockdown.

*International Tech-company Manager*

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The end of the concept of deregulation. I expect to see an increased propensity to move towards greater regulation of trade (store opening and closing times, Sunday closure, greater restrictions placed on shopping malls and e-commerce and a certain rise in protectionism) and employment practices (such as piecework, job flexibility, temporary employment and employee transfers), and a shift towards the nationalisation of strategic sectors such as healthcare, transport and education.

*Francesco Erspamer, Professor*

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## WHAT WILL BECOME OF OUR STORES?

Whereas, until a while ago, the main digital challenge for retailers was to try to make it more worthwhile for consumers to shop online than to shop in-store, nowadays that is no longer the case. Nowadays retailers are increasingly looking to trade on people’s fear of going out and about, on the risk of infection in crowded, enclosed spaces and on people’s desire to spend to kick-start the economy again. This becomes a major factor if we look ahead to the next decade. It’s unsurprising to note that, after 25 years of e-commerce, in-store purchases still make up 80% of all retail trading, even though electronic shopping has really taken off, particularly in the United States, where more than a quarter of all retail purchases recorded in April 2020 were made online<sup>6</sup> (a leap up from the 16% recorded early this year). By 2030, stores will no longer be designed around the main aim of selling products. The main route will increasingly see the advent of showrooms and display spaces designed to be “Instagrammable”. Retailers will reassess their priorities and the manner in which they connect with their customers. One way to do this would be to totally overturn the very definition of what constitutes a store, which will become a shared space, a co-working space in which the brand itself becomes promoter of numerous initiatives and selling becomes an optional, ancillary purpose rather than the main priority. While some of the big retail chains, from consumer electronics stores through to bookstores, were already starting to shut down back in 2019, 2020 has finally drawn a definite line between that which was purely habitual and that which is actually necessary. Within the next twenty or so years, over 70% of all purchasers will be made either by Millennials or Gen Zs. Clearly, the way we spend our money nowadays is set to change drastically.

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The Web will never totally replace physical stores, but will supplement and complete such spaces.

*Gianroberto Casaleggio*

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### 3 THE TOUCHLESS SOCIETY



### 3 THE TOUCHLESS SOCIETY

Will a digital way of life also be able to free us from the anxieties associated with Covid-19 in years to come, you ask? Many people, from experts in various industries through to analysts, have been asking themselves this very question in the past few months. The digital economy will undoubtedly receive a major boost from the current emergency, just as the SARS epidemic back in 2002 was credited with boosting China's e-commerce. While it may seem that the end of the tunnel is still far away, digitalisation is here to light our way through the tunnel. The current situation remains difficult and at times even paradoxical, particularly for us Italians. Social distancing requires that we adhere to certain rules that are totally contrary to our culture, the way we behave and the way in which we do things. However, the very same social distancing that enabled the infection curve here in Italy to flatten-out notably is not an On/Off switch that will be switched off tomorrow and allow us to go back to the way things were before, even psychologically speaking.

Our current society is de-facto "zero contact". Bars, restaurants and all sorts of shops now prefer contactless payment rather than cash and preferably via smartphone or smartwatch, so as to reduce the risk of infection as much as possible. While it is very difficult to see any positive side to the spread of the Corona virus, it is undeniable that the pandemic has speeded up the adoption of digital technology far more so than anything the corporate managers have managed to do over the past decade. Various strategies adopted by Chinese companies could work here in Italy too, as a driving force towards a new phase in corporate operations. Moving from crisis to seizing new opportunities is little more than a quick, small step, particularly if we manage to turn the lack of proximity into a digital presence that is able to overcome barriers. A Chinese example of this is Kuaishou, a social network video platform now worth around 28 billion Dollars, which has been promoting online education programmes developed in conjunction with the Ministry of Public Education as a way to make up for the closure of schools and universities. Similarly, a large restaurant chain has used the time available during the lockdown period to plan a new range of partially prepared dishes that can be purchased online, thereby capturing the attention of potential customers and meeting the housewife's ever-increasing need to escape the boredom of the repetitive daily household routine. Another example is Ant Financial, which has launched an online promotion providing free cover against the Corona virus, thus increasing their healthcare insurance revenues by 30% in February, compared to the previous month. These new practices will also spread elsewhere, amongst businesses and end-users alike.

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Digital technology will irreversibly become a major part of both our professional and personal lives since many people who knew nothing about it before have now discovered it and found it to be useful, easier to use and essentially reliable. The social, cultural, economic and democratic impact of this change will be huge, even though we may not yet be quite ready to accept a digital society by default.

A large part of the population is still lacking an adequate level of basic digital education and there is still a major digital divide that results in the kind of discrimination that has emerged and become a huge issue during the current emergency. The digital technology markets are still dominated by oligopolies whose effects are only partially governed. The dawn is only now beginning to break in terms of the development of digital ethics

*Guido Scorza, Professor and Attorney*

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However, such prerogatives envisage an existing basic infrastructure that is able to support the growth digital technology supply and demand. Here in Italy, which adapted well during the emergency period, not everything ran absolutely smoothly. It is sufficient to look at the difficulties that students in various areas of the Country encountered when attempting to go online, to be reminded that the digital divide has not yet been entirely eliminated everywhere on our peninsula. The digital divide has created a new premise for discrimination in society, which has in turn had a critical effect on day to day operations and sustainability on a global scale.

### 3 THE TOUCHLESS SOCIETY

The ability to fully access the Internet is fuelling the inequality and segregation that we are currently seeing in various fields. While there has been a concerted drive towards digital consumption, such drive should also provide for better connections to areas where even just sending off a simple e-mail can be very problematic.

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Broadband download capacity like what we only used to previously use to watch movies on Netflix is no longer enough since a significant number of Italians have now realized that they also need broadband upload capacity. This changes the entire competitive scenario in that it increases the importance of the new fibre-optic networks and also the need to progressively eliminate the old-fashioned twisted-pair lines of the past.

*Luca De Biase, Giornalista e Professore*

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I can see the future of digital infrastructure development: connectivity will be upgraded and the digital divide will be reduced, as will the cultural divide.

*Mariano Corso, Professor*

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We will use an image from nature, namely the beehive, to describe the scenario in which COVID-19 could profoundly transform the understanding of our social cohesion and social relations, perhaps leading to us willingly accepting control and thereby sanctioning the downfall of neo-liberal models. The structure of a beehive is one of the most-renowned symbols of ingenuity in nature. In an *Apis mellifica* beehive, tens of thousands of individual bees, as many as the inhabitants of a small town, all live together in a space that, proportionally, could be equivalent to that of an average apartment building. Saving space and materials is a priority and it's cheaper to manage the microclimate within a smaller space.

Within these colonies the insects have developed three main castes. The overall society is governed by a female, namely the queen bee, thus we can safely say that this is a proper matriarchal system. Consequently, the queen bee is usually the mother of all the individual bees living in the hive. A possible new world that could emerge from COVID-19 may well be one in which there are very few priorities, all dictated by the need to survive and for which it may well be worth sacrificing all of our individual liberties and values. To remain in biblical vein, this could be compared with the emergence of a new Babel (see: Genesis 11,1-9).

*Padre Paolo Benanti, Teologo e Professore*

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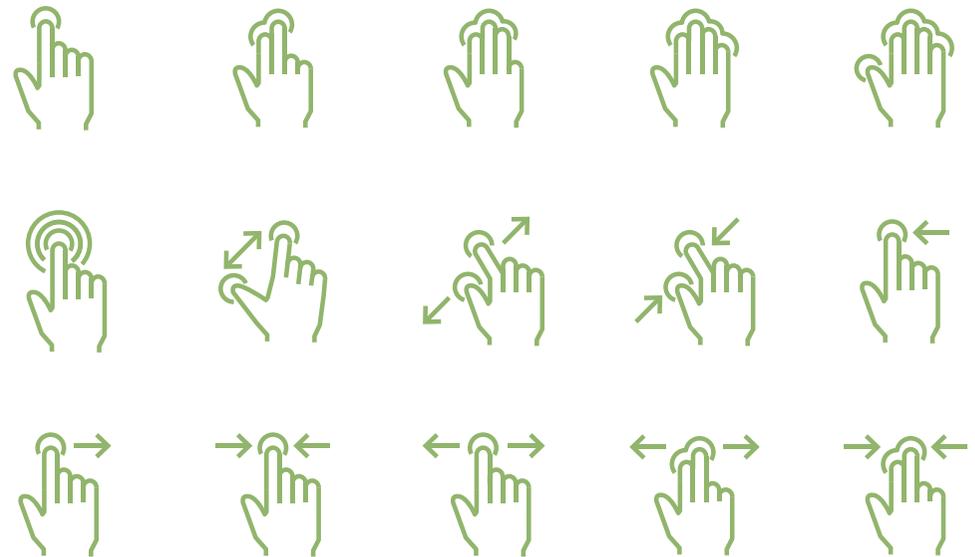
### 3 THE TOUCHLESS SOCIETY

# THE NEW ROLE OF DIGITALSKILL

To increase the cultural product accessed via digital technology requires a large-scale increase in digital skills. Users and businesses at all levels will understand that digital skills are an essential factor, not only in terms of efficacy and employability, but also in terms of increasing social inclusion and resilience.

Cognitive skills such as creative thought and self-control, as well as social skills such as the ability to take responsibility will become even more important when technology puts more power in everyone's hands than they currently have. This precept is based on the assumption that everyone has at least a certain level of moral and intellectual maturity whereby actions and experience will be inextricably linked and more tangible than they are at present. If digital technology further influences the way in which we think and behave, then clearly "perpetual touch", i.e. continuous pressure on a digital device screen, be it a smartphone or whatever other interface may be common in 2030, may well be worth far more than our current social coherence, which has in any event already been called into question by our having to maintain social distancing.

Are we never going to go near each other again? Difficult to say, but if the ever-present social networks and the communication media have changed human interaction from something specifically physical to something that is at least partly digital, a decade will be all it takes to see this influence take root permanently, without, however, becoming a bugbear for those who see the final demise of handshakes and hugs behind the growing use of proximity in bits.



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There will be a further, rapid increase in automation and the so-called "new" technologies, both those that are useful and justified by the need to reduce the congestion in our metropolitan cities and commuting, and those that are self-referencing and will that automatically arrive thanks to huge advertising campaigns, which are totally useless and socially harmful.

*Francesco Espamer, Professor*

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## 4 SMART MOBILITY:

from the public transport crisis to de-urbanisation

## 4 SMART MOBILITY: from the public transport crisis to de-urbanisation

One of the sectors that have been hardest-hit by the pandemic is the mobility sector. It's no mere coincidence that the video-conferencing platform Zoom alone is currently worth more than the combined total value of the 7 largest airlines.<sup>7</sup> Whilst on the one hand there are organisations that have worked hard to map the negative impacts of mobility on a global, regional and national scale<sup>8</sup>, on the other hand there are individual analyses that highlight the positive aspects of reduced travelling<sup>9</sup>. Given the extent and the widespread effects of the crisis on urban mobility, various challenges have emerged that really need to be addressed. The first of these challenges relates to public health: having realised that less traffic means less smog and particulates in the air we breathe, would it really be worthwhile to go back to travelling like we used to? Furthermore, are we really sure that the same numbers of people as before will be travelling on the local/long-distance trains, the metros and the busses without worrying about the risk of infection?



While we never really noticed much of an increase in the use of private cars during the initial post-lockdown period (also due to the relatively low number of companies that were actually able to return to normal operations from their offices), sooner or later people's innate mistrust of public transport will undoubtedly result in increased traffic and yet another increase in the amount of hazardous fine particulates suspended in the air. We need to totally re-think the way in which our urban areas are organised, so as to make them more environmentally friendly. This is an opportunity for which we have paid an exceptionally high price. We need to secure a more sustainable environment for the future. There are certain urban environments that have crested the peak by adopting specific examples of urban planning designed to prevent a return to the widespread use of private cars, to promote the use of public transport and to encourage the use of sustainable means of transport (such as bicycles and electric vehicles). The Italian metropolitan cities have speeded up their plans to make provision for these kinds of mobility, for example Milan, which will have created over 35 kilometres of new cycle-paths in 2020. In the case of Berlin's Kreuzberg quarter, cycle-paths are being presented as a creative way to ensure social distancing and prevent an increase in the use of motorcars. What they have done is to temporarily widen two cycle-paths so as to enable cyclists to maintain the required 1.5-metre social distancing gap. The pilot project has already been deemed a success in that it has improved cycling safety without hindering the traffic.

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Personal mobility hinges on a new concept of what constitutes “safety” and also relates to the issue of healthcare. This will entail increased controls and a reduction in inter-continental mobility, particularly if it is non-essential.

*Carlo Petrini, Gourmet and Sociologist*

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At a higher level, we are also witnessing changes in urban mobility that will alter the very fabric of our cities and our movements for decades to come. Three of the aspects that need to be re-aligned are public transport, micro-mobility and remote working. In order to remain pertinent and get back to its pivotal role in moving millions of passengers in urban environments, public transport will need to ensure adequate social distancing and must be reconfigured accordingly. Shared mobility, which includes micro-mobility, is an essential component of the social ecosystem of the past decade and is the reason why many towns will support this sector in future so as to gradually re-introduce people to the idea of individual mobility, a kind of mobility re-education programme if you will. Finally, remote working will help to expand our current concept of what constitutes a town to include very different peak-hour traffic flows, as a result of the redistribution of people that commute from home to the office and vice-versa at different times as remote working becomes more common and the traditional weekday peak-hour traffic disappears.

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Events, schools, commutes and all those other circumstances that lead to major flows of people are set to change profoundly and many activities will be re-dimensioned and at least partly performed in other ways (wherever possible) by using digital technology.

*Giorgio Metta, Scientist and Professor*

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## 4 SMART MOBILITY: from the public transport crisis to de-urbanisation

# THE END OF METROPOLIS

AS WE KNOW IT

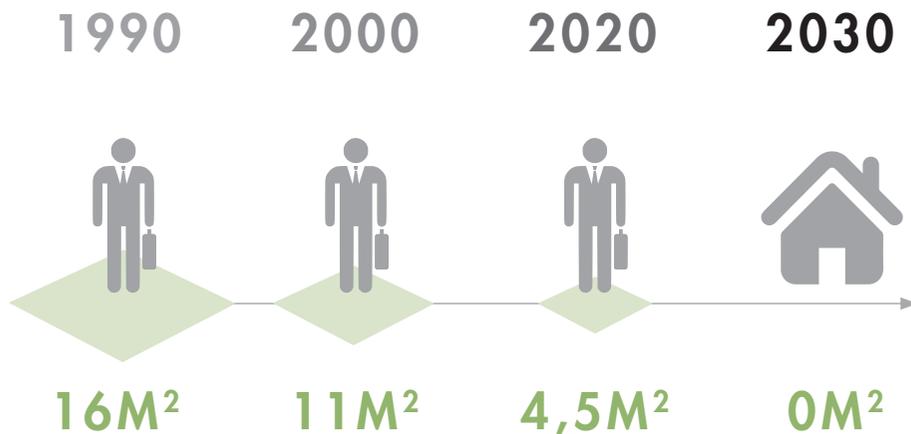
Since the overcrowded facilities of our urban lives, such as the public transport systems, are particularly susceptible to problems such as pandemics, it is quite possible that we will increasingly witness a process of rediscovery of the suburbs year by year, leading to de-urbanisation of our metropolitan cities. Anyone seeking to flee from the dangerous city centres will have many options at their disposal. The new technologies will make it easier for business to set up shop far away from the densely-populated metropolitan centres and the added impetus provided by the Corona virus has made this process even easier by highlighting the dangers of overcrowded urban areas for city workers and local citizens alike. Back in the '90s, companies based their minimum space requirement calculations on a figure of 16 square metres per employee, a figure that dropped to 11 square metres by the late 2000s and yet further to the current 4.5 square metres per employee. By 2030 that figure will have dropped to zero since, by then, the employees in question will be working from home.

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Being confined to home and smart working, together with improvements in the communication platforms will reduce people's need to travel long distances for work-related purposes.

*Franco Bernabè, Manager and Businessman*

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“Counter-urbanisation” will increasingly make more sense since moving to smaller towns, which are generally also safer, will suit everyone much better, particularly when viewed from a financial savings perspective. We know that pandemics are a really bad thing for densely populated urban areas, particularly for those that are relatively liberal. This has been true ever since way back in ancient times. The more vibrant the global system, from Rome to New York, Cairo, Venice, London and Paris, the more it is susceptible to the kinds of viruses that have emerged on a regular basis in the past two decades. The cities will undoubtedly recover, particularly if the property prices continue to drop, but the “de-urbanisation” effect will continue to drive people to move elsewhere.



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## 5 THE CHALLENGE OF THE “NEWLY POOR”

## 5 THE CHALLENGE OF THE “NEWLY POOR”

The tragic death toll of Covid-19 victims was accompanied by the virus' catastrophic effects on the global economy. In March this year, the United States alone shed more jobs than the number that were lost throughout the entire Great Recession of 2008<sup>10</sup>, with people without any college degree being the hardest-hit. Globally, job losses are estimated to be over 200 million, 40% of which being people working in high-risk sectors and with limited access to basic healthcare services (where not covered by any State healthcare system).

These are the people who will face the biggest problem in terms of finding other ways to make a living when the economic recovery eventually begins. Recognising that a disproportionate burden of the pandemic will be borne by poorly qualified workers, a recent survey revealed that the vast majority of people are worried that the virus is going to increase inequality.<sup>11</sup>

The reason for this is historical: many of the epidemics of the 1900s led to a rise in income disparity and a drop in the jobs/population ratio for individuals with only basic education, but not for those with higher qualifications.

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There are only two ways out of the crisis: either by destroying the fabric of society and forming gangs that will battle it out amongst themselves in an attempt to grab the few remaining available resources, or by building a shared vision of the future. At the moment, that situation is teetering on the edge and no one can predict which of these two options will eventually prevail. Precisely because of this, the future actions of institutions, social groups and companies will dictate which way the scale will tip as regards the aforesaid.

*Roberto Poli, Sociologist and Professor*

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Although a number of governments have already taken action to at least provide some sort of aid to companies, albeit minimal, in absence of any sort of specific protection for the more vulnerable sectors of society this pandemic may well have a greater negative impact on inequality. As a rule, new businesses are the ones that create new jobs, not the existing businesses that tend to be decidedly cyclical. The challenge that we must take on is to stimulate the establishment of innovative businesses, perhaps even ones that focus on addressing the effects of Covid-19 (social distancing, smart working, and new mobility).

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When the economy grinds to a halt, the last in line are left totally bereft of any resources. The kind of poverty with little or no prospect of improvement that never really existed in Europe and was relatively limited here in Italy as well, is once again beginning to weigh heavily on society. This phenomenon is not entirely irreversible, but the burden of the consequences of the general lockdown strategy is not going to get lighter anytime soon.

*Luca De Biase, Journalist and Professor*

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Global per capita GDP levels have only ever dropped on four previous occasions, namely in 1954, in 1982, in 1991 and most recently in 2009 as a result of the financial crisis. The effects of the pandemic are already very heavy, however, they will probably not affect everyone in the same manner. Even without necessarily looking at the numbers we can safely say that, should the decline continue to be felt more in the United States and Europe than elsewhere, the gap between the wealthier countries and the poorer ones would narrow.

This is the major trend that led to the drop in socio-economic inequality in early 1990. So, can we expect to see a similar scenario now? Will we see a decline in “Newly Poor” numbers, not due to “benign” forces but to declining growth in the wealthier countries? There are two ways to look at this.

## 5 THE CHALLENGE OF THE “NEWLY POOR”

The first is that, at the macro level, the answer to the above question could well be “Yes” because a downturn in the e-commerce economies in the USA and Europe would shrink the gap between these countries and certain other countries with great, albeit as yet unexploited, potential (Colombia, Vietnam)<sup>2</sup>. On the other hand, if we focus specifically on specific cases it becomes clear that, for the very reasons listed above, the gap between people living below the breadline and the wealthy cannot but increase.

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Farewell to the middle class and the proletariat, and the loss of the kind of dignity that comes with having any job whatsoever, in favour of the indiscriminate (and often senseless) utilisation of robots in many processes. The result will be huge masses of poor people who will consequently start a public revolt.

*Valerio Tacchini, Notary*

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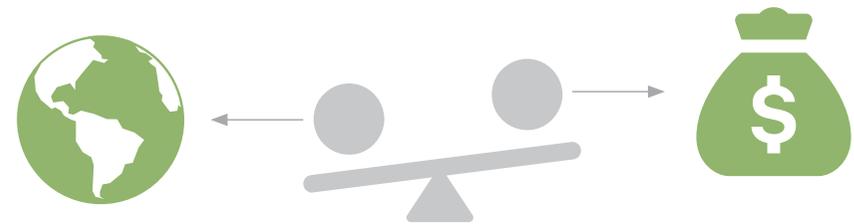
Inequality will increase and will be accepted as a fact of life, with the same crassness that we saw during the Covid-19 emergency, where we witnessed the very different treatment reserved for the young vs. the elderly, the disabled vs. so-called “normal” people, the rich vs. the poor and the digital illiterates vs. the geeks.

*Barbara Carfagna, Journalist*

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## THE NEW GLOBAL BALANCE OF ECONOMIC POWER

From a geopolitical perspective, the economic centre of gravity will continue to shift towards Asia. If Asia continues to be the most dynamic part of the global economy, everyone will naturally be driven in that direction. After a few years of financial uncertainty, in purely accounting terms, it will be time to re-establish the earlier power balance in which the Western economies were in a relatively advantageous position compared to those in the East. In a certain sense, we will see a major turnaround in globalisation as we know it.



This will be most evident in the initial stages, during which the movement of people and goods will be far more strictly controlled than before and, therefore, the removal of the restrictions will be both difficult and costly.

The countries that are notoriously reliant on western trends and consumption could turn to creating internal consumption flows, particularly those countries that have all the necessary strategic raw material reserves to do so and will thus no longer be subject to the whims of the multinationals.

A kind of productive self-sufficiency will destroy the pre-pandemic forces, thus turning the world upside down.



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[ MATCH ]



John Doe

AGE 35 HEIGHT 5'11"

Occupation Manager

Interests Technology, VR, Travel

Location London

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# 6 THE SEARCH FOR BALANCE BETWEEN PRIVACY AND CONTROL

## 6 THE SEARCH FOR BALANCE BETWEEN PRIVACY AND CONTROL

A digital-enabled world will undoubtedly work for some, but not for everyone. One of the major concerns when we were talking about the Italian contact tracing App known as “Immuni” was the issue of privacy and how much of the gathered data would land up on the “controllers” servers. After all, in this era of all-pervasive digitalisation and big companies promising not to sell our personal details on to third parties, it is clear that the fear of becoming a target for some sort of “Hunt for infected individuals” is widespread, even amongst people who are less au fait with digital technology (with the added risk of creating false assumptions and even outright scams). Hangzhou, one of the major cities in eastern China, the country where Covid-19 first emerged, has proposed the use of a permanent tracking programme to monitor its citizens’ respective lifestyles, for example, how regularly they exercise, when they gather in groups or when they sleep. Local officials state that the App would be based on the classic concept of contact tracing, but with a greater aggregation of big data, which would mean that they would land up with a lot more highly-sensitive information including, for example, personal medical case histories that go well above and beyond any possible after-effects that the Corona virus may have left behind. Since mid-February 2020, anyone using public transport or entering any public administration office in China is obliged to scan a QR code located at the entrance as proof that he/she is not infected. On Pincong, a Chinese online forum that deals with public-censure topics, one critic stated that the proposed App is far too reminiscent of the plots of various big-screen movies and television productions such as “I, Robot”, “Blade Runner”, “Westworld” and “Black Mirror”.

“ Numerous tools will be developed to monitor the population’s social activities and all of the associated complex issues relating to privacy and personal information will need to be addressed. In this regard, Artificial Intelligence and computerised vision will find a totally new, unprecedented, large-scale application and the public debate will focus on these very issues, not merely questioning and identifying possible limitations and critical areas, but also questioning what the information might potentially be used for.

*Giorgio Metta, Scientist and Professor*

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While the continental democracies are generally less inclined to merely accept across-the-board control, the adoption of monitoring Apps that are mainly aimed at monitoring public health is not totally out of the question even in Europe. As it is, smartphones and other connected devices already furnish a range of information that can be used to track individual movements and contacts with varying levels of specific detailed accuracy. Although this kind of digital surveillance requires users to consent to the data gathering, much of the information is already in the hands of the large companies anyway and is already being used for the purposes of predicting future trends. One intelligent-thermometer manufacturer is currently using the real-time aggregate body-temperature data recorded by users in their own homes to try to predict potential new Covid-19 hotspots<sup>13</sup>. From its side, at the start of the global lockdown the business colossus that is Google began furnishing central administrations with data on individual movements via Google Maps, precisely to enable them to identify any potential social distancing loopholes. These are examples of population-wide analyses based on more or less sensitive information which, if properly evaluated and utilised, could be of great assistance to public health authorities while simultaneously safeguarding individual privacy.



Things immediately become far more complicated when we transition from aggregate data to specific individual monitoring. By and large, there are two ways of tracking and tracing that are currently being pushed, each of which raises contrasting issues. The first of these is proper contact tracing, i.e. aimed at tracking the movements of infected individuals so as to be able to warn anyone potentially and unknowingly infected by coming into contact with the individual being tracked, thus enabling them to take appropriate steps to protect themselves and everyone else around them. This involves using Bluetooth technology and an ID anonymisation utility so that no one else knows which of the people the individual has been in contact with in recent days, voluntarily or otherwise, has tested positive. The second way is to specifically identify and track anyone who has tested positive for the presence of antibodies, which directly involves the work done by healthcare workers at the local care centres and hospitals.

## 6 THE SEARCH FOR BALANCE BETWEEN PRIVACY AND CONTROL

This type of tracking and tracing, which has already been proposed in both Germany and England, could be used to provide personal immunity passes to individuals and enable those who are no longer at risk to go back to work or get back to their usual social commitments. The big question is precisely where all the information from people's smartphones eventually lands up. This is where, once again, public opinion is split between centralised tracking and tracing systems as opposed to systems run exclusively by specially-designated entities. Furthermore, here, unlike in China, we're talking about the voluntary installation of Apps and, at least for the time being, such Apps would not prevent individuals from getting on public transport, or for that matter going into shops or public offices. In any event, this is precisely the kind of surveillance App to which personal privacy advocates object vehemently and with which they see a whole range of potential problems arising in future. There is always a certain risk that contact tracing may be used for purposes other than those for which it was originally intended and it's not too difficult to imagine that a number of authorities may indeed be seeking to lay the foundations for tighter control of individual liberties.

## CONTROLLING EMOTIONS

Smartphone video calls, GPS localisation requests and sharing photos that are date and time-stamped are just a few of the scenarios we will have to face up to when the need to minimise the risk of infection by current and future pandemics clashes head-on with our widespread use of digital technology. The global surveillance network will revolve around facial recognition techniques that enable the system to identify billions of citizens in just a few seconds. It's a bit like seeing George Orwell, wrapped in a Kafka, in one of John le Carré's novels: security above all else. Having learned how to remotely monitor body temperature, blood pressure and heart rate, now governments have got to the point of monitoring emotional status of individuals anywhere and anytime, in their offices and even in public places, particularly if they are wearing a smartwatch or other connected devices. Anger, joy, boredom and love are mere biological phenomena just like a fever or a cough, so the same technology that will be used to identify potential Covid-19 infection in 2030 will also be able to identify happy laughter or sadness.

Once the manufacturers have negotiated agreements in place with governments and healthcare organisations, they will all be able to gather massive amounts of biometric data, which will enable them all to get to know more about us, predict and manipulate our feelings and sell us whatever they wish, be it a product or a politician. Biometric monitoring has suddenly turned some of the hottest topics of the past decade into something that belongs in the Stone Age. Countries that were already authoritarian before will become even more so and may even force every citizen to wear a bracelet as a means to track every individual not only physically, but their emotional status as well.

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Although there are thousands of signs of resistance against the prospect of increased traceability, the issue of protecting society against the Corona virus engenders a feeling of reluctant tolerance that will probably be irreversible as regards electronic social monitoring, notwithstanding the fear of algorithmic fascism, even the old-fashioned kind. The lockdown may perhaps one day be acknowledged as an irreversible push towards datocracy. Once this kind of datocracy becomes limitless, the individual retains his/her physical but not his/her mental independence

*Derrick de Kerckhove, Sociologist and Professor*

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One of the greatest changes of all is the sacrifice being asked of people in terms of their intimately personal matters, which are already and will forever continue to be violated.

*Valerio Tacchini, Notary*

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## 7 CENTRALISATION VS. DELOCALISATION OF HEALTHCARE: HOME CARE VS. HOSPITAL CARE

## 7 CENTRALISATION VS. DELOCALISATION OF HEALTHCARE: HOME CARE VS. HOSPITAL CARE

As regards the healthcare system's response to Covid-19, the numbers tell a story of the snap adoption of life-support equipment and a consequent decline in well-established, traditional modus operandi. One survey<sup>14</sup> has revealed that the crisis unleashed by the Corona virus has impacted on 97% of all routine medical flows. What this means is that, for the past three months, all the things that people were previously going to visit their family doctors, specialists or the hospitals for never got done at all or had to be adapted so as to minimise contact between the medical practitioner and the patient. At this point, we can only guess what long term repercussions this emergency is going to have on healthcare in this Country. Numerous observatories have highlighted that, no matter what happens from now on, the healthcare sector has changed forever. Online remote treatment will now play a much bigger role than it did before and many of the procedures carried out at medical centres will now be done at home. After all, during the pandemic we all saw those images of overstretched hospitals and an ever-increasing fear of infected, but we also realised the vital importance of having a solid, high-tech healthcare system.

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Various manufacturing enterprises in the healthcare sector will speed up their digitalisation and automation processes. Interest in the field of application of remote control robotics will increase greatly, however, few companies will be able to access this kind of technology in the short term.

*Giorgio Metta, Scientist and Professor*

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It is sufficient to think about the new medical script issuing procedure that was tested during the pandemic, whereby the medical practitioner sends the patient a medical script via SMS (as a code) to his/her personal mobile phone, thus speeding up the process of collecting the required medication from access-controlled pharmacies. This was in fact little more than a logical “add-on” to the pre-existing “electronic script via e-mail” system already in use prior to the pandemic. In addition, as a result of recent advances in Cloud technology, it made perfect sense to adopt the kind of solutions that the healthcare system was looking into to

digitally optimise its work procedures. Dedicated websites where patients can make medical bookings or download test results have become the order of the day following initial tests to enable contact between patients and medical professionals for quick consultations online via video-chat. Currently the prerogative of pay-to-use platforms only, the public healthcare system will be obliged to enable something similar in view of the kind of future in which we will only go to a doctor in extreme cases of need. Moreover, the utilisation of virtual reality equipment (VR/AR) has increased and software applications specifically designed for the healthcare ecosystem are already helping to change the relationship (as well as the proximity) between the parties involved in the medical “relations”. During the course of the pandemic, thousands of hospitals worldwide made use of remote technologies to check up on the progress of patients in quarantine, thereby relieving at least some of the burden on busy healthcare staff. Continuous progress in terms of anything that can be done at home will also mean that doctors will no longer need to spend quite as much time at their rooms, thereby saving on travelling time and visits by appointment.



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Healthcare systems will change, become more connected and thus increasingly make use of telemedicine and home visits.

*Mariano Corso, Professor*

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## 7 CENTRALISATION VS. DELOCALISATION OF HEALTHCARE: HOME CARE VS. HOSPITAL CARE

The treatment of chronic ailments such as heart failure, chronic lung disease and emphysema, cancer and neurodegenerative diseases will gradually move towards a more “home-based care” system, i.e. no longer in hospital but at home. Home care is generally less costly than hospital care and Covid-19 has proven that many more elderly patients can be treated just as successfully at home, without necessarily being admitted to hospital. Obviously, given the length of the time it has been taking for patients to fully recover from this virus in 2020, it means that patients will need to be monitored more regularly and for a much longer period, all the more reason for this to be done at home.

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“Modular hospitals” will be created that will be better equipped and be able to react far more quickly to potential medical emergencies. Admissions to these facilities for the purposes of diagnostic and surgical procedures and treatment will, by default, follow differentiated internal routes that, while potentially more efficient, could lead to greater “centralisation” of the national healthcare system.

*G.C. Medical Practitioner and Professor*

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The term “centralisation” refers to the way in which things can be organised, ranging from numerous smaller units to one large, dominant unit. The choice will see-saw between a centralised response and a satellite response that favours quality over quantity. A few hospital Hubs on the one hand vs. a network of smaller local facilities with all the necessary tools to enable them to deal with routine healthcare matters and to deal with emergency response in the event of a potential pandemic, so as to prevent the healthcare system from collapsing due to unpreparedness.

# GENOMA 2030

## ANALYSIS OF NORMALITY

Whereas in 2015 the outlines of the Google Genome project seemed rather dystopic and post-human, by 2030 anyone who sets foot on Earth will have undergone Genome Sequencing. Already five years before then, i.e. in 2025, there will already be somewhere between 2 and 40 Exabytes of genome data available, in other words, a billion-billion bits of human DNA data. A global platform will act as container for this huge quantity of data items and over a billion people will already have chosen to share their Genome data online. From 2021 to 2031, the quantity of Genome data generated each day will double every 12 months, requiring the construction of dedicated data centres running on superior Artificial Intelligence that will simultaneously ensure the incorruptibility of the sequence data and protect the system against potential external intrusion. But why such a boom, you ask?

During the Covid-19 pandemic, it was widely recognised that it would be opportune to be able to link the host’s genome profile to the highly variable clinical manifestations of the illness. This infection (as is true of all infections) is in fact a complex interaction between the microbe itself, the environment and the human host. Variations in the human genome have regularly been linked to the complications associated with various diseases and, since by the end of 2020 the researchers’ objective will have become to identify the factors that increase an individual’s susceptibility or resistance to the aforesaid complications, then the genome mapping of the world’s entire population will become essential rather than merely a secondary concern. For this reason, the scientific community has rapidly mobilised its efforts to discover as much as it could about the Corona virus by means of large-scale genome sequencing studies. Overall then, by the beginning of 2022, our knowledge of DNA will have led to the discovery of a cure for infected patients, thanks to risk-stratification and other targeted prevention and treatment options.

## 7 CENTRALISATION VS. DELOCALISATION OF HEALTHCARE: HOME CARE VS. HOSPITAL CARE

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The pandemic has created a new perception of ourselves as a non-independent human species ( D. Haraway calls it Sympoiesis) and indeed as dependent on certain factors, elements, viruses and other entities that were until very recently deemed to be inferior and relatively unimportant. Proof of this is the way in which our view of healthcare has changed and is now far less focused merely on symptoms and medical treatments, but increasingly more focused on prevention and continuous monitoring of indicators and available information via App. Direct access to biometric data and the spread of molecular medicine will considerably reduce our reliance hospital facilities and will encourage the spread of a different perception of healthcare that is more eco-friendly, preventive and less focused on the individual. Everything about us, including our lifestyle, diet, consumption and leisure time will be linked to our health.

*Massimo Di Felice, Sociologist and Professor*

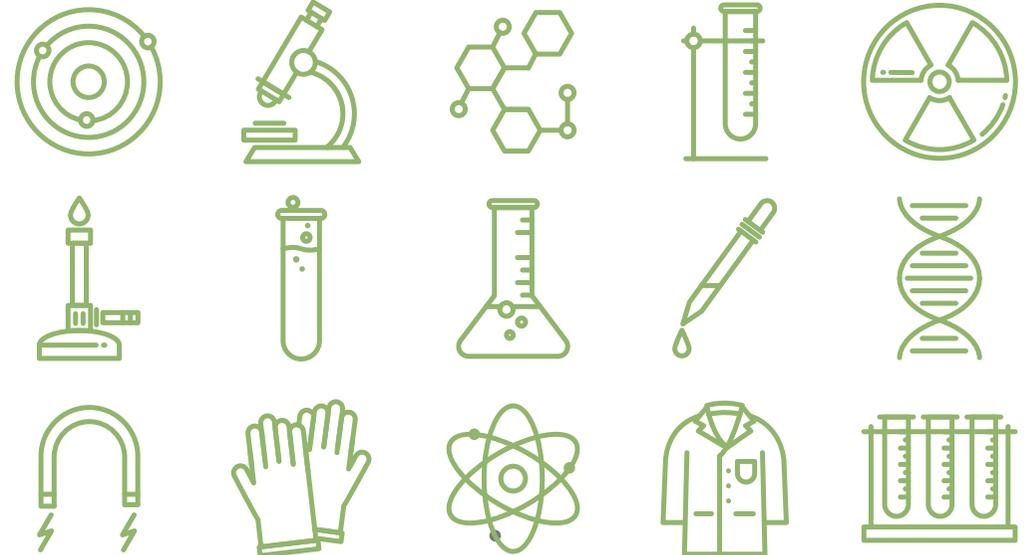
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Healthcare will become a personal matter, thanks to the utilisation of domestic diagnosis and personal care tools.

*Roberto Costantini, Manager and Author*

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# 8 A NEW EDUCATION PARADIGM

## 8 A NEW EDUCATION PARADIGM

At the very peak of the pandemic, over 1.2 billion children in 186 countries were forced to stay at home due to the pandemic. Here in Italy, thousands of children in all classes had to adapt to the new situation and attended school lessons online, which was not always a trouble-free experience due to poor Internet connections and the number of different platforms utilised. In any event, this unexpected shift in habits raised one big question, namely “Will learning from home continue even after the crisis has ended?” Even before Covid-19, the growth in education technology was already quite evident, with so-called “Ed-Tech” investments peaking at 18.66 billion Dollars in 2019<sup>15</sup> and a potential overall market value of up to 350 billion Dollars by 2025<sup>16</sup>.

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**We are already seeing certain changes in the area of school education: remote learning is already increasing, as is self-learning supported by the new technologies.**

*Mariano Corso, Professor*

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In response to significant demand, many of the online learning solutions even here in Italy have now come to the fore after many years in which the only people interested in them were those working in the field. A consequence of this was the greatest ever experiment of this type, which started in China where a total of over 250 million students followed lessons from home, a boom that began with 730-thousand students in the Wuhan area alone. Technology now turns a simple computer screen into a classroom where various people with different roles can interact to establish a truly collaborative learning environment. The computer has become so important these days that having computer skills is equivalent to being able to speak one or more foreign languages. But this does not only refer to compulsory education institutions, and indeed, the universities have also changed. These days, tutors using Apps can “meet with” dozens of students in a day, whereas before they only had sufficient time for perhaps half that number. Clearly it’s not only about the number of people we interact with, but also about the quality of the interaction, and that doesn’t only apply to basic school education as such.

Thanks to the latest developments in the field of distance learning, companies of all sizes now not only have the option of not shutting down their own in-house training programmes, but also that of starting many additional programmes while at the same time cutting their overall teacher/trainer costs, their travelling costs and the cost of having to reschedule employee commitments. These days, you can fit in an online lesson during your lunch break or at the end of your work day and use that time to enhance your professional skills.

This approach is not without its critics, who claim that this sudden, rapid switch to online learning may turn out not to be particularly gratifying for the user. However, this model will become part of a hybrid learning system. The experts have been saying for some time now that we need to rethink the way we educate our future generations. Covid-19 has signalled a sort of point of no return in terms of questioning the current system and reflecting on how this disruptive crisis may yet help us to come up with new ways to educate future classes. Not only will the methods change, but also the respective roles of teachers and students. Parents have already reinvented themselves and become makeshift teachers by learning about online learning tools first hand. Learning to learn has become an essential skill as we have had to try out certain tools that we had never come across before.

There are certainly a few of challenges to overcome. Some students with no access to a reliable Internet connection may be left behind in their studies or without any real help, the risk being that the inequality due to the digital divide will increase. 95% of students in Switzerland, Norway and Austria have their own personal computer on which to do their homework, whereas one third of Italian families do not even have a single PC or tablet at home, with southern Italian families being the even worse off<sup>7</sup>.

A number of studies<sup>18</sup> have shown that, on average, students learn about 25-60% of their subject matter online, compared to 8-10% in class. This is mainly due to the fact that it takes students 40-60% less time to learn a lesson via e-learning since they can go at their own pace, go back and re-read or skip entire sections, or speed up as they wish. Clearly this pandemic has undermined an education system that was already becoming less relevant. Nevertheless, the efficacy of digital learning varies depending on age. For example, children need a structured environment since they are more easily distracted and, therefore, they need the kind of personal interaction that distance learning obviously cannot provide.

## 8 A NEW EDUCATION PARADIGM

One thing that applies to everyone equally is “lifelong learning”, which will become increasingly essential in the coming years as we begin to realise that our current knowledge, perhaps gained at university-going age, is fast becoming obsolete. “Lifelong learning” is just around the corner and is one of the factors that will create more opportunities for the workers and managers of the future.

# THE FUTURE OF LEARNING IS ALREADY HERE

Schools and companies are increasingly utilising online education tools. An ever-larger slice of the population will be utilising personal devices, although there will always be certain gaps in the poorest parts of the world where they will be obliged to continue using traditional methods, also due to a lack of infrastructure. Families will get used to the new way of learning and the role of educators will decline, to be replaced by parents and relations who will find themselves delegated with the task of “supervising” home-schooling activities.

Nevertheless, home schooling will never fully replace the classroom or training venue since the latter still offer too many advantages to be totally replaced. If we were to highlight a major advantage of the widespread adoption of online education and training, it would be that it enables personalised educational programmes.

Virtual coaches follow each student (scholar or worker) individually in order to check up on their progress and fill any knowledge gaps to bring the learner up to the class average. In the past, this kind of tutoring would only have been possible by means of extra lessons where necessary, whereas, within a decade after the outbreak of the Corona virus, “tailor made” knowledge will already be bearing fruit around the world.



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The overhaul of lifelong learning mechanisms with a distance-learning approach, to include an increasing number of sections of the population in the development of voluntary self-learning that is not bound by the concept of formal skill attribution.

*Venture Capitalist and Entrepreneur*

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# 9 SOCIAL CIRCLES THAT UNITE THE DIGITAL SECTOR THE NEW PROXEMICS

## 9 SOCIAL CIRCLES THAT UNITE THE DIGITAL SECTOR THE NEW PROXEMICS

We will continue to bear the scars resulting from the changes brought about by Covid-19 within us for some time to come. Over and above the healthcare emergency, to which our global systems have had to respond very quickly, there is also another crisis that has changed certain habits that are very dear to us Italians. The sudden halt in the exchange of handshakes, hugs and kisses amongst family members, friends and colleagues has had a devastating effect on everyone's day to day life. The months spent in lockdown led us to rediscover the "quality" of our digital links, i.e. those relationships that used to be notoriously abstract and detached from society and that have now taken on a new, perhaps more profound but certainly more apparent dimension. It is unclear what could happen in future, but any attempt to recreate our pre-lockdown lives will not be nearly as simple as accepting the idea of the new proxemics. For months we maintained social distancing, kept at least two metres away from each other, avoided touching communal surfaces and avoided crowds. It was extremely difficult to change the habits of a lifetime of social rules based on physical contact suddenly hindered by a face covering.

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The pandemic has led us to drop our resistance to the idea of a purely digital society. The equation "distant but close" is written into the new dimension of our human relations: the digital dimension has "entered into" our lives (because we clung to it). The emergency made us begin to have more faith in this new day to day dimension because, at times, it was all we could do. We learned – perhaps against our better judgement – to view it as a true confidant.

*Chiara Rostagno, Architect and Professor*

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One aspect that will be difficult to handle when physical contact once again becomes part of the mechanism that we use to establish relationships, friendships and family bonds are the endorphins that flood our brains and make us feel warm and positive inside. Could a new kind of online socialisation perhaps become our response to day to day concerns and excessive isolation? Could we rethink our relations with others from a digital perspective? The most likely scenario is the continuation of that which has emerged in the past few months. Group chats with dozens of relatives whom we scarcely thought about before yet suddenly became important to us in terms of finding out how relatives living in various parts of Italy and around the world were keeping.

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At least for a while, there will be a greater chance of success for people who have managed to turn rationality and skill into personal strengths, especially when compared to those who are more inclined towards being likeable and empathetic.

*Guido Silvestri, Medical Practitioner and Virologist*

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Possibly, or rather probably, larger or smaller social circles will be established that include a variety of people based on their level of intimacy. In this way we will move on from chats with "relatives" to a sub-group of "close relatives" or "top colleagues" and so on. More or less the same subdivision of people into social groups will continue even after our relations go back to being ever-closer, more direct and in person. There will be inner circles made up of people with whom we feel at ease and are prepared to touch, and outer circles ideally made up of those that we should more wary of.

## 9 SOCIAL CIRCLES THAT UNITE THE DIGITAL SECTOR THE NEW PROXEMICS

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Once the Corona virus has been conquered, there will be a general change in mentality, at least for a while. As occurs with all epic events such as wars, the pandemic has made us reflect on our hierarchy of values and weed out those that are important from those that are less so or not important at all. I foresee a definite change in all our family and personal relationships. It may turn out to be the only really positive factor resulting from this epidemic.

*Massimo Fini, Author and Intellectual*

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The risks involved in close contact are nothing new to us, although the modern-day healthcare emergencies do carry greater risks than those of years gone by. Ever since the advent of Aids, there has been a major social stigma attached to those who tested positive to the virus. Many people feared that a handshake was sufficient to spread HIV, notwithstanding all the evidence to the effect that the disease was indeed sexually transmitted. It was within this context that Princess Diana shook hands with a patient who was being treated at London's Middlesex Hospital back in 1987, in an attempt to quell all the groundless fears. That transition wasn't easy then, nor will it be in the case of Covid-19.

Lack of physical contact, which deprives us of a profoundly human feeling, will not necessarily spell the end of society as we know it. Laughing, singing, dancing, telling stories and taking part in religious ceremonies (albeit with all the necessary precautions in place) are not a surrogate for, but rather an integral part of the sacredness of our lives and will continue to be so. While we may continue to be doubtful about touching others, remaining socially distanced does not necessarily mean not feeling close to others.

## THE NEW FEELING OF PHYSICAL CONTACT

For decades we have withdrawn into a state of high existential uncertainty, which has caused us a huge amount of stress. Notwithstanding the fact that the infection numbers will have declined all the way down to zero within a couple of years from now, living in a state of confusion and worry will have become the norm. Certain jobs, such as those requiring physical effort, will either have disappeared altogether or will have been taken over by robots and automated systems, while others, such as analysts devoted to “transitioning” human beings towards an unexpected kind of normality in which everyone is wary of others, will flourish.

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Very rarely in the history of mankind have we ever found it impossible to live in groups. This results in a chain reaction of different effects that impact on various aspects of our lives, from work through to leisure time and from sport through to our appreciation of art, music and culture. The simple matter of living in a communal society will be subject to new rules that will initially be written down and will subsequently become the new “normal”. This will inevitably involve less socialisation and a new way to stay close to each other, perhaps online?»

*Carlo Petrini, Gourmet and Sociologist*

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## 9 SOCIAL CIRCLES THAT UNITE THE DIGITAL SECTOR THE NEW PROXEMICS

Yet the social distancing that was dictated by the advent of the pandemic has enabled us to review certain of our judgement criteria that were already literally out of control by the end of 2019. Amongst these is the importance of time itself and the amount of time we dedicate to cherishing others. Human beings have not suddenly become totally dedicated to others but, also partly due to the fear of infection, physical closeness has taken on a whole new meaning and has become more real, more human and one of our top priorities. There are also those that have taken this to a whole new level by walking around without any sort of face covering or Plexiglas visor whatsoever in public places or even in public offices. Winning the battle against the Corona virus has enabled governments, at least on paper, to allow life to get back to what it was before the pandemic, although in the aftermath of Covid-19, society has made millions of people extremely wary when they leave home and find themselves in places where they have no control whatsoever over many people who could, at least potentially, be carriers of various as yet unknown diseases.

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In our historiography we have learned to differentiate between fact and fiction. We have been taught to separate that which is destined to be forgotten and that which is instead destined to pass the test of time as a kind of collective testimony. At times such as these, we have learned to grasp the basic joy of survival. Only those who have lived through the dramas and traumas of history (or of society) can fully understand what it means. In these terms, we have learned that joy and happiness are able to flourish even in times of absolute desperation (just as courage is able to flourish even in times of fear). When this happens, when collective day to day experience becomes a shared legacy (pertaining to the realisation of the individual's potential and sharing his/her joy), it becomes a sort of “eternal moment” worthy of inclusion in the biographies and create a unique and special bond between the individual and the community.

*Chiara Rostagno, Architect and Professor*

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In the aftermath of the Corona virus, we will be more aware of social ties and connections and we will re-evaluate them, positively or negatively, depending on how much time we are able to, or prepared to dedicate to them. The isolation test will help us to clarify the value of these ties in our own minds and within the context of our everyday lives, as well as how they contribute to our overall quality of life, which will in turn lead us to spend less time on social activities that are deemed to be superfluous, including the use of the social networks for socialising rather than communication purposes. By way of example, the advertising industry is already heading in that direction. This process will also be further enhanced by the changes brought about by the new remote working methods, which are set to become more prominent.

*Beniamino de' Liguori Carino, Manager*

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A certain amount of “social distancing” will become a feature of typical Italian social life. A relatively small number of people may continue to wear face coverings and latex gloves at all times, which may hinder interpersonal interaction. In this regard, we will be obliged to rethink many of the “infrastructural” aspects of our society.

*Guido Silvestri, Medical Practitioner and Virologist*

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# 10 A MORE RESILIENT SUPPLY CHAIN

## 10 A MORE RESILIENT SUPPLY CHAIN

The shock to the global economy resulting from the Covid-19 healthcare emergency has been extreme insofar as all of our respective National economies are interdependent. While shutting down national borders and applying trade restrictions was the initial response to the pandemic, these measures soon proved to be an unfeasible solution, or at least not as feasible as taking coordinated action and balancing the respective needs and production capacity of each of the individual Countries.

The drop in trade was inevitable, especially since the hardest hit areas were precisely those at the very epicentre of the global market, namely China, the European Union and the United States. These three macro-regions alone generate more than half of all global trade, so the economic slowdown was felt absolutely everywhere. However, it's important to remember that while these production chains have made the various economies more interdependent, they have also introduced some important elements of efficiency in many sectors and have made goods available at prices that have favoured mass distribution. We're not only talking about "food & beverage" here, but also about all those products for which self-sufficiency depends entirely on the continued resilience of the supply chains.

In the planning of supply chains, traditional demand forecasts are based on previous sales. Clearly, such statistics<sup>19</sup> that relate to what happened in the past are a poor indicator of potential future sales, especially so considering such factors as real-world events like sudden market changes and climatic, natural or healthcare disasters.

The progressive spread of the Covid-19 crisis is clearly evident from various statistics that show the number of industrial sites shut down in various parts of the world (including Italy) and the volumes of product purchases from China during the same period, with Wuhan being the first major region of the world to be placed in quarantine. After the earthquake and the Tsunami hit Fukushima back in March 2011, many multinational companies learned the importance of diversifying their respective supply chains to include suppliers located in countries other than Japan (especially as regards high-tech labour). Nowadays, the very same thing is happening once again with businesses whose supply chains are almost exclusively reliant on Chinese suppliers. So, how do we go about increasing the resilience of our systems?

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There will be an emerging need for self-sufficiency, particularly as regards foodstuffs, energy and manufactured goods. The global supply chains will take note that the Chinese factories are no longer supplying what they need. Their vulnerability to this major single error of judgement will continue to become increasingly evident. Our globalised production is reliant on a single huge hub rather than a network of smaller, decentralised, more resilient hubs. Vertical agriculture could ensure some sort of foodstuff sustainability at the town or community level given that, as things stand at the moment, the more advanced hydroponic vertical agriculture farms require less water and less transport than traditional farms. Local production will become increasingly important: given the specialised nature of products, 3D printing will increasingly become the way to go.

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The Covid-19 crisis has benefited the multinationals, which have been able to restructure their respective production facilities to comply with the measures adopted in the areas in which they operate. This experience could therefore convince the companies to adopt a less "fragile" approach to risk-management so as not to find themselves "held hostage" in any one single Country.

*Matteo Bonelli, Attorney*

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## 10 A MORE RESILIENT SUPPLY CHAIN

For example, with the new technologies such as Artificial Intelligence and natural language processing that enable businesses to monitor the supply situation as the foreign accessibility indices change, it's hard to believe how, back in 2020, any business could possibly still be managing a global supply chain with no idea of what more or less foreseeable events could potentially interrupt their supplies. Naturally, there is a certain cost attached to being proactive in this manner. There is the option of multiple provisioning<sup>20</sup>, which entails setting up suppliers and sites in various different countries. It may well be costly, but one payback could be that the company can reduce its business quota allocated to the more expensive countries. The advantages of being able to quickly switch from one supplier, factory or country to another generally assures a good return on investment, even in view of other factors such as reduced dependency on inventory, manual processes and the large numbers of people.

A quick, reactive and agile supply chain will remain operational no matter what may happen from one day to the next. In the first few weeks of January, companies that had mapped their supply chains already knew exactly which of their raw materials came from the areas of Wuhan and Hubei<sup>21</sup> and were therefore able to adopt precautionary alternative measures relatively quickly. The epidemic has taught us that a solid system for monitoring suppliers is an essential requirement in terms of optimising the supply chain.

## THE SUPPLY CHAIN BETWEEN ARTIFICIAL INTELLIGENCE AND REDUCTION OF EMISSIONS

Artificial Intelligence, machine learning and deep learning already play an important role in supply chain planning systems worldwide. The post-Corona virus decade witnessed the large-scale adoption of advanced technologies that enable constant, real-time monitoring of the current risk level of the countries in which the companies' suppliers are located, with a certain level of periodical variation. Alongside this, collaboration and data sharing rapidly eliminated waste in the supply chain. Just ten years ago, the large corporate groups of companies wouldn't even have dreamt of sharing critically sensitive information with their suppliers, who also have agreements in place with their competitors.

Instead, nowadays they do so over the Internet and, as a result, the suppliers themselves are able to monitor product stocks in their warehouses from a privileged position that, together with predictive technologies and the Internet of Things, enables them to plan their work better. In addition, the consolidation of blockchain has enabled the acquisition of accurate information at any time, thus guaranteeing that the transaction information is available to all of the parties involved. In 2023, the analysts prediction of a few years earlier, namely that 90% of all initiatives relating to supply chains linked to blockchain would never work, were proven wrong.

Instead, the supply chain network was able to grasp the added value that technology had to offer, thereby giving them a major competitive edge over those who instead chose not to take advantage of it. Finally, so as to prepare themselves to deal with the progressive changes resulting from global climate change, already back in 2021 companies began to think about how they could integrate flexible supply-chain planning models into their systems in order to be able to source alternative materials and resources where necessary. This entailed a prompt response, namely to lower environmental impact requirements and favour partnerships with suppliers that could help to reduce both costs and Co2 emissions. The two countries that

## 10 A MORE RESILIENT SUPPLY CHAIN

benefitted the most from these programmes were China and India which, after the Covid-19 crisis, increased their commitment to supporting intelligent, eco-friendly supply chains. In all sectors, climate-smart planning strategies became an integral part of supply chain logic by late 2025.

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The physical industrial production model will envisage a far more aggressive process of automation and the concentration of physical production in huge, low land-cost spaces that will enable shift work (even in terms of transport) and distancing. This will spell the end of the model that envisages large concentrations of small to medium-size firms in districts.

*Roberto Costantini, Manager and Author*

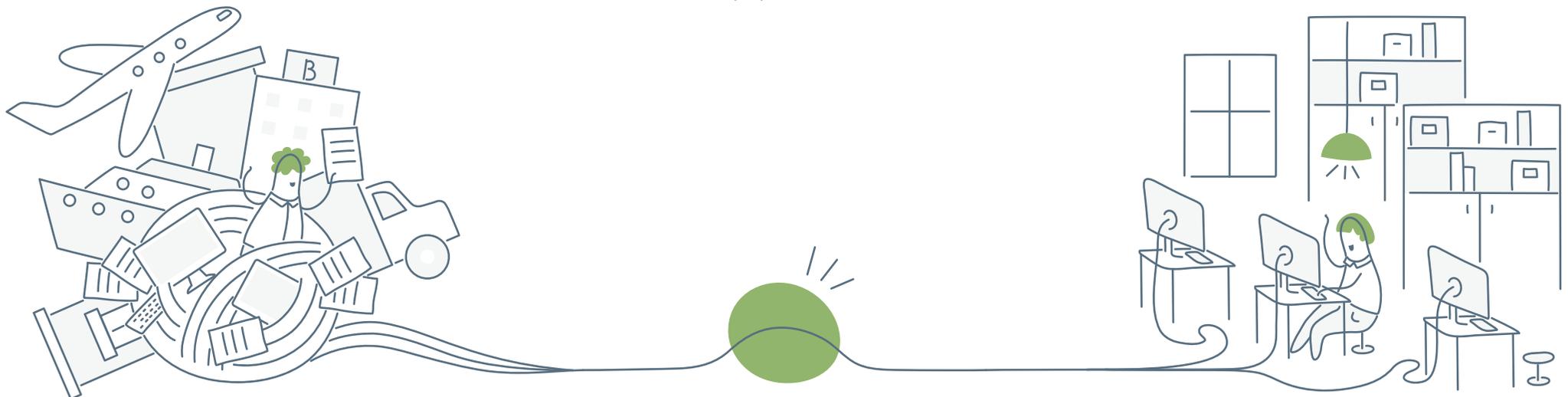
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Companies' industrial policy choices will change profoundly. We will see a drastic reduction in people's intercontinental travel, although the same may not necessarily apply to goods. Similarly, we will also see the reconstruction of industrial supply chains in strategic sectors, which will increase the level of domestic independence (by domestic I mean infra-regional, in other words Europe, North America, China, Asean, etc.).

*Valerio De Molli, Businessman and Manager*

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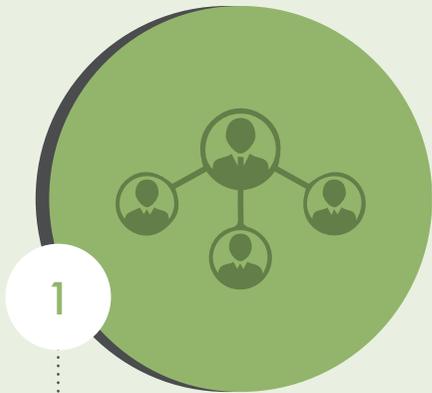
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# THE FUTURE IS STILL CONTROVERSIAL

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated



1

• Events and networking, it's just farewell



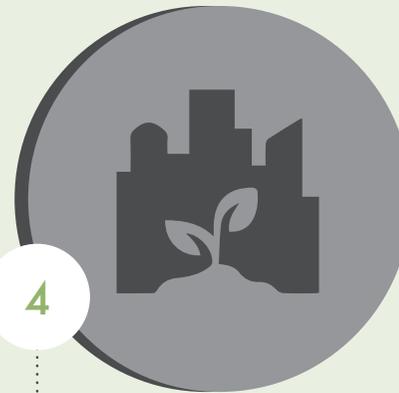
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• A new way to assess actual well-being?



3

• Marginalisation of the elderly



4

• A world looking to self-sufficiency and urban farming



5

• Working less and working smarter?



6

• Is this the end of the line for globalisation?



7

• Will the demise of the metropolitan inner city benefit the outlying areas?



8

• Is it goodbye to fossil fuels?



9

• The State will once again become the focal point of the country



10

• Will tourism become a luxury reserved for the fortunate few?

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

## 1 EVENTS AND NETWORKING, IT'S JUST FAREWELL

The lockdown period proved to us that physical contact is not always essential. The video-calls and webinars that until recently were little more than a show-off or only used when it was absolutely necessary, as well as having become an everyday thing have now also gained greater acceptance.

According to the figures provided by the sector's experts<sup>22</sup>, each year, worldwide events involving some 200-thousand exhibitors and attracting 20-million visitors generate 60-billion Euro in revenues and contribute to 50% of participating companies' exports. But the big question is, at what point will the fear of infection drive people to avoid huge trade fairs in favour of digital contact?

Why YES	Why NOT
<p>The need to limit the risk of infection will drive many sectors to opt for virtual meetings and conferences.</p> <p>Companies and organisers will realise that there are potentially huge savings to be made by not taking part in trade fairs and that these savings will more than make up for any losses due to the lack of physical contact.</p> <p>Rather than dedicating an entire day to just a few appointments at a trade fair, "opening up" to a digital avenue will improve communication, which will not be bound by space and time.</p>	<p>Public events will never entirely disappear, partly because many such events achieve results that are difficult to achieve by means of online presence alone (scientific round-table discussions, networking, and matching job supply and demand).</p> <p>The ever-present digital divide may discourage participants from developing countries and emerging economies that lack the necessary infrastructure for exclusively online business relationships</p>

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Let's use the example of scientists, medical practitioners and researchers that travel regularly for work-related reasons, to attend public conferences, consider proposals and plan projects at meetings with large numbers of international participants. This will change drastically and, increasingly often, face-to-face meetings will be replaced by "web meetings". Some people may immediately think: lower costs, fewer trips and more working from home, but that is not always the case. Graduates, doctorate students and post-doctorate students rely on conferences to meet other senior scientists, introduce themselves and find the right job. Conferences are particularly important when no one knows who you are and what you do. There will be a need for platforms that can cope with anything up to 50-thousand participants.

*G.C. Medical Practitioner and Professor*

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People could attend drive-in format public events where everyone remains in their car to watch the show.

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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Very rarely in the history of mankind have we ever found it impossible to live in groups. This results in a chain reaction of different effects that impact on various aspects of our lives, from work through to leisure time and from sport through to our appreciation of art, music and culture. The simple matter of living in a communal society will be subject to new rules that will initially be written down and will subsequently become the new “normal”. This will inevitably involve less socialisation and a new way to stay close to each other, perhaps online?

*Carlo Petrini, Gourmet and Sociologist*

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Social and behavioural changes will then be “instrumental and tactical” and ready to be reabsorbed by a new and broader perception of existential convenience.

*Luca Josi, Manager*

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## 2 A NEW WAY TO ASSESS ACTUAL WELL-BEING?

The economic and social indicators that are currently used to assess the well-being of a country will no longer be valid in the post-Covid era. The numerous opportunities for afterthought, both collective and individual, provided by the virus will leave behind significant after-effects here in Italy as well. Is the growth that we are so anticipating and which will take at least two years to actually arrive really be what people want after having lived through the upheavals of early 2020? Is getting back to work, getting back on the frenetic roundabout and not even having the time to call a cousin living in another region really the best way to view the future? Without denying the importance of modernisation and scientific and technological advancements, perhaps it may be a worthwhile exercise to reconsider the value that we place on things and on the people around us, with a view to safeguarding our world and its environment.

### Why YES

Unless it is transformed into investment in other fields, wealth based on raw materials will soon disappear and with it all the advantages of assessing new times with obsolete indicators.

The experience of Phase 1 lockdown revealed new ways to look at socioeconomics and to identify inequalities, disadvantaged groups and the Newly poor.

Spending less and spending more wisely may not only reduce company revenues, but could also contribute to preserving the still prevalent use of energy from non-renewable sources.

### Why NOT

The global economies are so diverse and fragmented that the use of a single, simple parameter is still the best way we have to estimate growth.

Using the non-availability of products and services to encourage the re-utilisation of the existing ones could result in a scenario of psychological recession and instability.

We can go back to a production based approach as a way to meet human needs without necessarily undermining the profit motive.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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Amongst the few positive bits of news regarding the impact of the Corona virus were undoubtedly the reports of the resurgence of wildlife, the clarity of our seas, the silence in our urban areas and the visibly cleaner air that we're breathing. These reports confirmed two separate claims that, on the one hand the impact of our lifestyle is indeed harmful and really is due to industrial and domestic pollution and, on the other hand that a change in our economic and social behaviours really could result in a happier planet Earth. Furthermore, the lockdown has called into question the need for our previously longstanding love of going out to buy yet more clothing and other things in general or even going out just for the sake of going out, without any particular reason. Nowadays, a review of our individual priorities has led us to pay more attention and to care more about wanting to live in a clean, safe environment.

*Derrick de Kerckhove, Sociologist and Professor*

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This spells the beginning of the end of an economic system based on infinitely increasing growth on a finite planet, with Covid as the accelerator of latent, already existing environmental and social crises.

*Luca Mercalli, Climatologist and Scientific Journalist*

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The months spent in lockdown and the inability to go out and spend due to the closure of all the shops will reduce people's propensity to consume, especially since we have all personally witnessed the advantages of prioritising necessity over the superfluous. As a result, it follows that manufacturers and advertisers of non-essential goods will find it more difficult to entice the bulk of consumers back to the consumption levels prior to the pandemic.

*Domenico De Masi, Sociologist and Professor*

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The pandemic has created a new perception of ourselves as a non-independent human species ( D. Haraway calls it Sympoiesis) and indeed as dependent on certain factors, elements, viruses and other entities that were until very recently deemed to be inferior and relatively unimportant. Proof of this is the way in which our view of healthcare has changed and is now far less focused merely on symptoms and medical treatments, but increasingly more focused on prevention and continuous monitoring of indicators. Everything about us, including our lifestyle, diet, consumption and leisure time will be linked to our health.

*Massimo Di Felice, Sociologist and Professor*

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

## 3 MARGINALISATION OF THE ELDERLY

We have learned to recognise that the elderly is the age-group that has been hardest hit by Covid-19. It was especially essential for them to have access to healthcare services during the pandemic, both for emergency care and for their usual medical needs. Even healthcare workers, social services, family members and members of the community that routinely help people deemed to be “Seniors” (i.e. >65 years of age<sup>23</sup>) had to start paying even more attention to their daily routines if they were assisting such people. Will concerns regarding elderly people’s long-term health being affected by potential future viruses mean that we will be obliged to restrict the freedom of such individuals and perhaps even shift some of their rights to younger people?

Why YES	Why NOT
<p>The need to safeguard the health of the elderly will shift the burden of “important” old-age services to where it really should be.</p> <p>Community participation and involvement in decisions affecting the community will be reduced, thereby resulting in more time being spent at home and away from meeting places.</p> <p>To counteract this “social detachment”, the elderly will play a bigger role in day to day family life, like looking after sons, daughters and grandchildren.</p>	<p>Introducing age-based restrictions, even for healthcare reasons, will not be socially acceptable in the long-term.</p> <p>There are other, more controlled activities that could be considered to keep the elderly occupied while at the same time safeguarding their health</p>

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People over 60 years of age (and even more so those over 70-80 years of age) will become more aware of their potential for exposure should the virus make a comeback and could change certain social dynamics, potentially shifting the balance of power and authority to 40-50 year olds.

*Guido Silvestri, Medical Practitioner and Virologist*

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Greater awareness in terms of the allocation and distribution of time according to the individual’s stage of life.

*Andrea Faragalli Zenobi, Manager*

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

## 4 A WORLD LOOKING TO SELF-SUFFICIENCY AND URBAN FARMING

On the one hand we have the re-discovery of home-made foods, while, on the other hand we have the difficulty being experienced by many supply chains due to the closure of factories and a smaller workforce. In the United States, where abattoirs were shut down for a certain period of time, part of the industry turned to meat substitutes such as vegetable protein, which became more popular than ever before.

With the re-organisation and re-opening of businesses, many states will decide to create self-sufficient provisioning sectors as a direct response to potential consumer demand in the event of future crises, systemic locks and the shutting down of borders. Potential clues are everywhere, particularly here in Italy where the food supply chains have always been a major area of focus. The future is increasingly speaking the language of innovative, sustainable agriculture, which is one of the linchpins of economic growth. Is our future destined to be all about self-sufficiency?

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Awareness of the fact that we are busy destroying our biodiversity, exhausting our natural resources, causing the disappearance of the ozone layer and aggravating the effects of greenhouse gases will continue to increase. This disaster will increasingly be blamed on the neo-liberal concept of economics.

*Domenico De Masi, Sociologist and Professor*

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### Why YES

Investing in internal agricultural capacity means improving the financial conditions of everyone involved in agriculture, thus ensuring supply equity and variety.

Sourcing the supply of certain products exclusively from certain countries around the world, means running the risk of those suppliers being unable to supply what we need in the event of natural disasters, wars and pandemics. Self-sufficiency means greater protection against such events.

Competition would push farmers to become more specialised and to supply a better quality product than is currently the case.

### Why NOT

This kind of scenario would be virtually if not totally impossible. All countries rely on importing at least a part of their foodstuff requirements, including from the major exporters that produce far more than what their country is able to consume. North Korea, a country with government policies that can, at best, be called autocratic, nevertheless still imports foodstuffs and accepts International food aid.

After years of battles for rights, denying farmers the right to export their goods now would mean depriving them of a significant chunk of their income.

Not all countries have adequate basic natural resources to be able to meet all of their food requirements countrywide in a sustainable manner, for example those that are prone to water shortages.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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**Urban Farming:** Many people have discovered that growing the food you eat at home is great and makes you feel more comfortable, particularly during a lockdown. Automated production systems such as the AeroGarden systems will become a common feature in all homes. Such systems enable anyone to grow their own top-quality vegetables, under cover, all year round, with no mess, no weeds, no chemicals and you don't even have to have green fingers.

*Gianmauro Calafiore, Businessman*

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## 5 WORKING LESS AND WORKING SMARTER?

Here in Italy, some 142,348 unemployment claims were submitted in March 2020 alone, up 37.2% compared to the month before. According to what was announced by the Inps (the National pensions and welfare body), as at April 2020, the total number of authorised layoff hours claimed (excluding social welfare funds) amounted to 772.3 million: the figure for the same period in 2019 was 25.3 million. So it is patently clear just how quickly the healthcare emergency triggered an economic crisis here in Italy, as it did elsewhere too. Obviously we also need to consider everything that lies between the employed and the unemployed. For example, there are those who, while they were not receiving full unemployment benefits, were put on short-time with the promise that sooner or later everything would go back to normal, notwithstanding their scepticism. The reason, you ask? Sufficient to consider the purchasing power of Italian families who were forced to delay outlays that were deemed to be important

pre-Covid (the car, the scooter, the new sofa, etc) in order to be able to buy essential goods. Less demand means less money available to employ people in jobs that are already very much under threat of being taken over by robots in the very near future anyway? Can that really be true?

### Why YES

Certain sectors of our economy (transport, hotels, and restaurants<sup>24</sup>) will struggle to get going again in the short term, with the forecasts estimating that this will only happen by Q2 of 2021. This will entail cutting costs, which is already happening.

Walmart, one of the US's major chain stores, is using robots to clean its floors. The reason given is "lower risk of infection", but the cost containment aspect is just as important.

After the initial "call to arms", our hospitals will see the biggest ever staff restructuring exercise whereby hospital employees will be replaced with freelance staff, both in direct contact with patients and in medical and surgical consulting rooms.

Once a company has invested in replacing human workers with robots, it is highly unlikely that the company will ever again employ a human being in that kind of job.

### Why NOT

It is far more likely that in future jobs will involve greater collaboration between man and machine.

After a few years of adjustment, one of the consequences of Covid-19 will be the increasing importance of transitional job skills aimed at new professions where being human and autonomous is perfectly integrated into many tasks.

One area where man continues to outperform robotic systems is the ability to innovate. Robots merely do what has been programmed into them and there is no room whatsoever for improvisation.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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The devastating effects of the pandemic, in terms of unemployment, will remain with us for a while, particularly in the areas of tourism and above all in the superfluous goods manufacturing sector. Meanwhile, technological progress will continue and the entrepreneurs will use the incentives to purchase robots and Artificial Intelligence rather than sign on flesh and blood workers. In summary, technological unemployment added to that due to the Corona virus will force us to reduce working hours in order to avoid social conflict caused by excessive unemployment.

*Domenico De Masi, Sociologist and Professor*

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Production: automation will be the primary objective.

*Daniele Manca, Journalist*

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This incredible speed-up in the rate of innovation, digitalisation and technology is destined to become permanent. Many firms will have equipped themselves with appropriate technical tools and work processes in order to adapt to a more widespread, permanent culture that envisages wide-ranging accountability, at least in those value chains where this is possible.

*Valerio De Molli, Businessman and Manager*

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## 6 IS THIS THE END OF THE LINE FOR GLOBALISATION?

The “end of globalisation” has already been predicted on numerous occasions in the recent past. The advent of Covid-19 and the renewed focus on “glocalism” seem to have brought this issue back in vogue. Nevertheless, many people prefer to talk about “post-globalisation”, an era in which state intervention and nationalisation strategies become stronger and more of a reality. Consumption, production and investment are all aimed at incentivising the local “brand”, without denigrating everything foreign but giving preference to neighbouring countries. Can glocalism, as opposed to globalism, really be the only real response to aggressive state intervention, closure of borders, restriction of individual movements, “social distancing”, the collapse of the travel sector and certain other geopolitical changes? The right response would be greater cooperation, with the kinds of technologies that enable us to adapt to change at the very epicentre: data, blockchain and AI.

### Why YES

Some people maintain that globalisation has enabled the spread of illnesses and also favoured a profound interdependence between businesses and countries that makes them more vulnerable to unforeseen shocks.

When it was said that globalisation was “irreversible”, it seemed to be an irrefutable fact, but all it took was a tiny virus to halt all international movements and to show which countries are dependent on others.

### Why NOT

The fact that the “post-globalisation” theory was so often touted in the past means that it won’t go away in just a few months and, above all, it won’t be able to go away due to the absence of the essential prerequisites.

Globalisation is much like modernity itself, i.e. it is an innate feature of human behaviour in the new millennium, where the cultural aspect, in its broadest sense, is always near at hand.

As to precisely when, hopefully soon, companies begin to come out of the economic crisis will depend entirely on industry’s ability to adapt to the “new normal”. In order to achieve this objective we mustn’t rely on different forms of sovereignty, but instead look for other ways to do business, such as online.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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Pre-Covid, no one would even have dreamed of questioning the globalised nature of our world. Our unfettered and blind faith in globalisation led us to believe implicitly that it would simply continue to evolve indefinitely: this virus has brought about the collapse of these artificial foundations and made it impossible for us to ever go back to our earlier concept of globalisation as we knew it. However, globalisation itself was one of the contributing factors to the pandemic itself and to the quick and unstoppable spread thereof and that's why we will no longer take anything for granted and, in future, we'll ask ourselves a few more questions regarding strengths and limitations.

*Carlo Petrini, Gourmet and Sociologist*

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This virus has clearly shown that it makes no distinction whatsoever in terms of geography, politics, gender, status or wealth and this will contribute to a collective sense of awareness also known as the “Butterfly-effect”, which says that the flutter of a butterfly's wing in China can become an avalanche in the Alps. We are all somehow connected in this world in which we live and I really struggle to understand this argument as to whether our globalised world is a good or a bad thing since we cannot go back in time anyway and the entropy of our universe will increase by definition.

*David Corsini, Businessman and Manager*

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Globalisation in its neo-liberal form will go into stall-mode for some time, to be replaced by a range of actions linked to the particular interests of the political classes in countries with greater spending power and more of a say in economic decision-making, which will create much more room for authoritarian control even in the relatively more advanced democracies.

*Luca De Biase, Journalist and Professor*

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There will be no irreversible change (meaning perennial) because our world is destined to become ever-more globalised. The pandemic may temporarily halt this process but will never totally hinder it. It's a natural result of evolution as distances get shorter and consequently the world's economies become increasingly interconnected/interdependent.

*Valerio De Molli, Businessman and Manager*

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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The pandemic appeared at a time when we were already seeing some signs of potential de-globalisation. We will probably see an increase in trade-related tensions and a push towards the repatriation of strategic production chains. It is perfectly reasonable to expect to see product manufacturing returning to within national borders and, at the same time, a drop in market share for those businesses that have greater foreign exposure.

*International Tech-company Manager*

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## 7 WILL THE DEMISE OF THE METROPOLITAN INNER CITY BENEFIT THE OUTLYING AREAS?

The move out of the inner cities is one of the anticipated effects of the Corona virus and one that the real-estate market has already taken into account. Many investors, property owners and potential buyers are asking themselves what the future holds for the metropolitan cities, what with the decentralisation of economic interests, jobs and entertainment that were notoriously centralised in the big cities. The strong demand for residential space in recent years due to the continuous influx of people into the metropolitan cities has led to a significant increase in home purchase and rental prices. Now we're seeing a reverse-trend highlighted by two recent events. The first of these is in Milan, where the Unibail-Rodamco-Westfield Group has announced that their plans to build the biggest shopping mall in Italy, due to be called "Westfield Milano" and located in Segrate, have officially been put on hold. Furthermore, the French real-estate

company Klépierre has released its 2020 Q1 financial results: turnover has dropped by 4.2% and rental income by 4.7%, mainly due to business shut-downs. Estimates for the Italian real-estate market suggest that it may take as long as three years to recover the accumulated losses incurred to date, which amount to a total of 122 billion Euro<sup>25</sup>.

### Why YES

The massive influx of people that caused the suburbs and outlying areas to expand ever-closer to the big metropolitan cities over the past two decades is already now beginning to move in the opposite direction.

People's search for wellbeing, relaxation and a better balance between work and home life will cause their love of city-life to decline and thus increase the demand and supply for a more suburban lifestyle.

### Why NOT

Above all here in Italy, where we have around ten real nerve-centres of business in total, the effects of the Corona virus will only be felt to a certain extent before business goes back to what it was before the healthcare crisis.

With all the necessary protection and prevention measures in place, there will be no reason whatsoever for people to leave the metropolitan cities and risk having to travel long distances every day just to get to work.

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The urbanisation model will see an increasing trend towards flight from the city.

*Roberto Costantini, Manager and Writer*

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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From the cities through to the provinces - globally - in recent years there has been a trend of accelerated growth of the major urban centres and also in the belief - all around the world - that the city would be the winning model for creating added value. The Virus (fear) and the spread of digital connectivity have called into question the economic basis of 'urban convenience' and the supposed low cost of the transaction. It remains to be seen how this return to lower density will be broken down by social / demographic group and what policies will have to be adopted to ensure that society's poorest don't remain 'trapped' in high-density areas while the wealthy move into new urban developments in less populated areas.

*Francesco Caio, Manager*

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The prices of city apartments will plummet. Smart working will enable people to work from their homes outside of the city, students will return home and rents will no longer be paid in the city centre.

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## 8 IS IT GOODBYE TO FOSSIL FUELS?

High crude oil prices, the environmental crisis and the increasing demand for electricity have been the driving force of the rapid rise in the use of renewable energy sources worldwide. All of these factors were weakened by the advent of Covid-19. The economy swerved towards recession and, as a result, the energy demand declined, in turn resulting in surplus supply and lower prices. Furthermore, with the slowdown in the in the transportation of goods, the weight of public opinion regarding global warming and air pollution has deteriorated significantly, notwithstanding the fact that the gradual return to normality will undoubtedly lead to an increased resurgence of these concerns worldwide. Is this perhaps the perfect time to finally relegate fossil fuels to the rubbish bin and to now start laying the foundations for a new energy paradigm?

### Why YES

The countries that are more aware of environmental issues want to reduce their dependence on the energy providers and increase their own economic and structural resilience by meeting their population's energy requirements from internal sources wherever possible.

This kind of self-determination would provide more flexibility in terms of managing costs and supply, even in response to crises due to various factors.

### Why NOT

In most countries the renewable energy sector is heavily dependent on imported supplies from other regions, mainly China.

Major doubts exist at the moment with regard to the problems of global supply chains, with a number of solar and wind-power projects already facing logistical delays.

The United States and Europe rely heavily on low-cost solar power photovoltaic (FV) modules and cells (FV) that are made in China.

The voyage towards renewable Energy sources will continue, Covid-19 or not, however without the sudden adoption of the kind of alternative tools that we have seen in other sectors.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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The fossil fuel industries (petroleum, gas and coal) will go up in flames due to disinvestment, which will hit record levels, and the huge influx of new investment in sustainable energy sources will create tens of millions of new jobs.

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## 9 THE STATE WILL ONCE AGAIN BECOME THE FOCAL POINT OF THE COUNTRY

On the political front, in the past few months we have witnessed the State becoming the focal point of the Country as never before in our recent history. For certain people, this new order raises a couple of not inconsiderable risks, namely economic statism and the regression of our democracy. The biggest challenge, however, is in Europe itself, since it will have to somehow defend its markets and control its continental territory while at the same time responding to the collapse, both ideological and otherwise, of other areas as well.

As the first of the well-established western democracies with decentralised healthcare facilities to take action, the idea for strengthening Italy as a country with centralised government was patently obvious, at least initially. Notwithstanding the fact that very existence of the liberal model is based on the individual being able to control his/her own choices, the Government grabbed the reins, tightened its hold, urged everyone to stand united and managed the uncertainty. Will this modus operandi continue in the coming months, you ask? And will this spell the demise of deregulation and privatisation?

### Why YES

By taking on the role of direct promoter of innovation and training initiatives, Central Government can speed up those processes that, in private hands, never really managed to hit the target in the past.

The construction of a reliable and totally public healthcare system would enable the alignment of medical centres and hospitals according to basic guidelines and thereby assure at least the basic levels of care in the event of future epidemics.

### Why NOT

Recovery will require a combination of concerted, integrated and virtuous public spending and private capital investment so as to be able to select initiatives with the greatest potential for overall return on investment, while limiting the phenomena that are typical of poor selection.

It will spell the end of the dichotomy in the respective roles of the state and the markets, in favour of a hybrid development model.

Privatisation notoriously leads to greater competition, transparency and social equity, as well as a reduction in public debt. Ending privatisation would therefore be yet another blow to the already difficult task of getting the Country back on its feet.

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We definitely foresee a growing role for Government and the private sector, which had previously been re-dimensioned. This is true both as regards the economy (public enterprises, regulations and controls) and as regards civilian life (individual behaviour, healthcare distribution and controls).

*Innocenzo Cipolletta, Manager and Economist*

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# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

“ The greater the role of the state – meaning the country as a whole rather than merely the institutions – the greater will be the solidarity between individuals, the appreciation of trades previously deemed to be “old” or marginalised and the appreciation of public healthcare, which is one of the prime public service areas that are still deemed to be a part of our overall social security system.

*David Corsini, Businessman and Manager* ”

“ I foresee the stature of multinationals like Amazon increasing, perhaps even to the point of becoming like smaller states within a state, precisely like the East India Company of the capitalism history books.

*Francesco Erspamer, Professor* ”

“ The end of the dichotomy between the respective roles of the state and the markets in the economy, in favour of a hybrid public-private development model. In order to recover, we will need an integrated, virtuous combination of public investment to identify industrial policy priorities aimed at long-term socio-economic development, and private capital with the ability to select initiatives with the biggest potential overall return on investment while limiting the phenomena that are typical of poor selection.

*Venture Capitalist and Entrepreneur* ”

## 10 WILL TOURISM BECOME A LUXURY RESERVED FOR THE FORTUNATE FEW?

The High-Performance Computing Center in Stockholm has developed a digital twin model for the German town of Herrenberg, so as to enable anyone to watch local events taking place in the town, in real-time and in Augmented Reality, and also to spotlight the town as a prime tourist destination<sup>26</sup>. Some say that this will enable people to cherry-pick the destinations that best suit their expectations, while others maintain, perhaps somewhat cynically, that virtual tourism will soon be the only thing that many normal travellers will be willing stretch to, or able to afford. There are many reasons for this, both financial (due to probable increases in flight costs, hotel rates and restaurant prices) and psychological, namely the fear of being infected in foreign places. But that's not all: what could happen should an Italian fall ill on the other side of the world, maybe even something as simple as a bit of a fever? Could a kind of tourism that is more controlled, less like mass-tourism and, therefore, in smaller groups perhaps help to enhance the experience of seeing towns, cities and artworks, and perhaps even life itself?

### Why YES

In many places, tourism has grown beyond the limits of sustainability and also at the expense of the local communities.

Cruise ships ferry thousands of passengers around every day for half-day visits that cause gridlock in terms of mobility in the location but leave behind very little in terms of financial benefit for the locals.

Less long-distance travel will mean a lower environmental impact.

Staying close to the area where you live could also be a catalyst that enables you to feel more in touch with the fabric of the area.

### Why NOT

If people stop travelling, then the economy and all the satellite activities grind to a halt.

Tourism is not the kind of cultural product that can be replaced by a digital experience. If anything, virtual reality may enhance a physical visit but can never be a real substitute.

Tourism provides a substantial contribution to a country's GDP. Here in Italy, Tourism contributes around 13% of this Country's gross domestic product.

# THE FUTURE IS STILL CONTROVERSIAL

10 forecasts debated

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Tourism will become less intensive and that will protect our overcrowded Art Cities. Venice and Florence, for example, will experience fewer problems. It will be a far less “democratic” process for the tourism operators and the tourists alike. We have to choose whether to make tourism more expensive and exclusive and turn the whole of Italy into one big Emerald Coast, or whether to try to retain its universal appeal but nevertheless keep it somewhat exclusive.

*Barbara Carfagna, Journalist*

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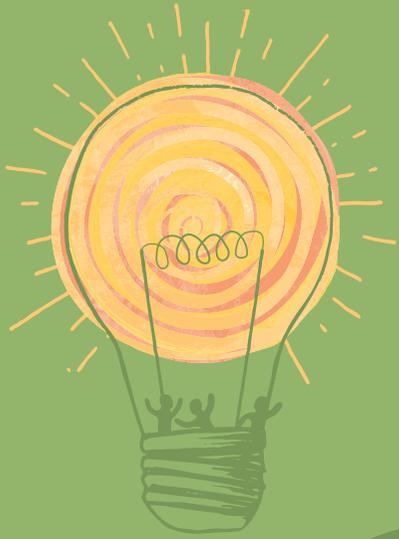
Greater caution as regards public gatherings, socialising and cultural and tourist events, which will tend to become virtual.

*Luca Mercalli, Climatologist and Scientific Journalist*

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ASSOCIAZIONE

GIANROBERTO  
CASALEGGIO

# OPTIONS FOR RELAUNCHING ITALY IN 2020

## OPTIONS FOR **RELAUNCHING ITALY IN 2020**

The role of the State in the economy was the root cause of the major ideological differences of the 1900s. This time of systemic crisis is helping us to set aside the classifications of the past and objectively identify all of the individual interventions that the State needs to urgently undertake right now. In order to understand these general directions, we approached various experts in their respective fields, as identified by the members of the Gianroberto Casaleggio Association, to tell us about their possible solutions and their opinions regarding the intelligent choices that will have to be made in 2020 in order to get Italy going again and to cast solid foundations on which to build a better Country.

We then asked the members of the Gianroberto Casaleggio Association to prioritise these measures in terms of urgency. This process enabled us to outline an Eisenhower Matrix to describe what should be the State's top-priority economic interventions at this time.

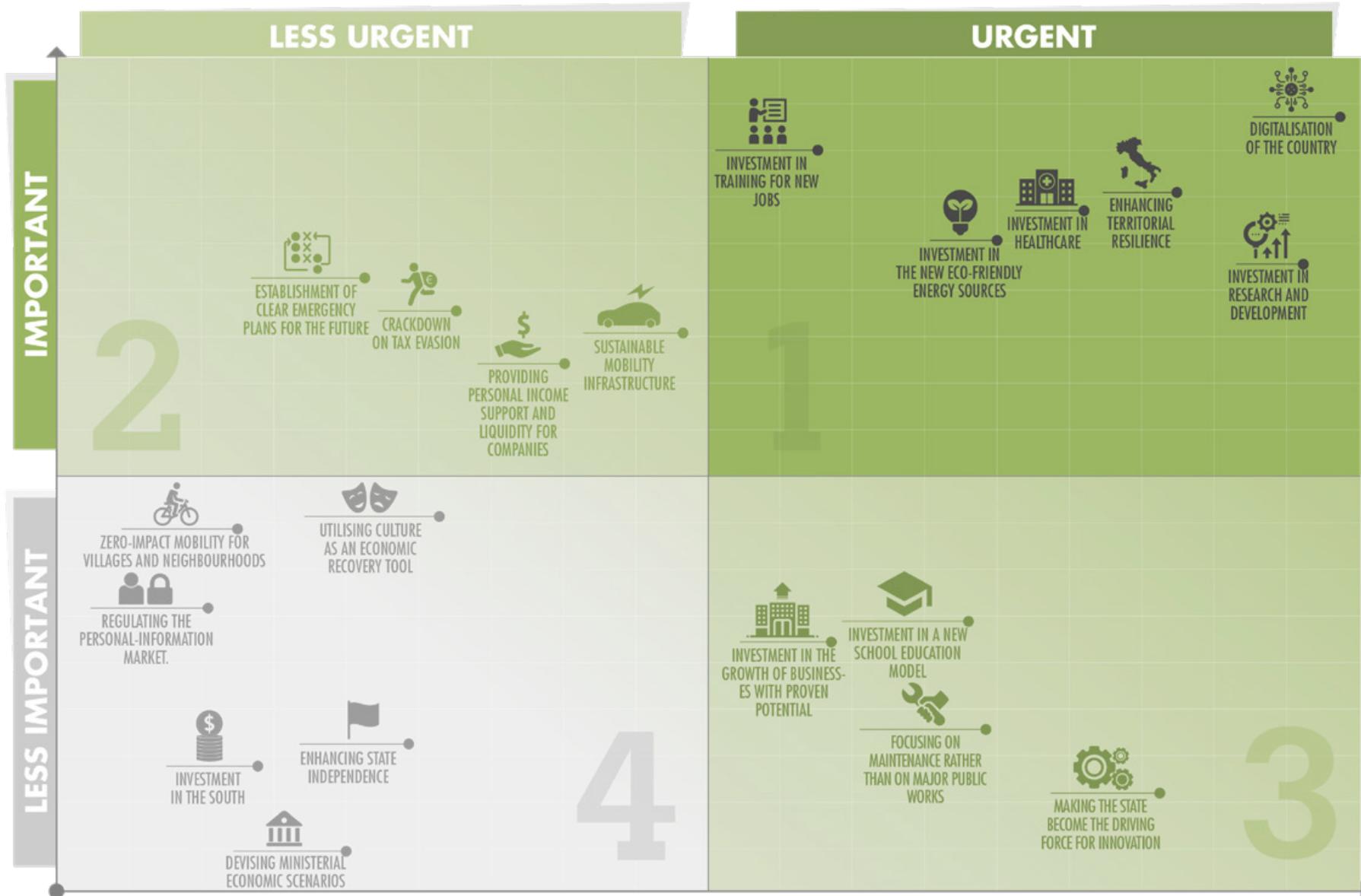
The key aspects of the relaunch include the following: training for new jobs, digitalisation of the Country, territorial resilience, intelligent renewable-energy, decentralised a digital healthcare, investment in research and development, income and liquidity support, investments solely in companies with a credible development plan, emergency plans developed beforehand and sustainable mobility infrastructure.

The investment choices that the State will make this year will not only be needed to relaunch the economy but, even more importantly, will dictate what will become of Italy over the next ten years. Indeed, in future, it is unlikely that we will be able to afford to invest the kind of sums that will need to be made available in 2020.

Therefore, the investments we make in 2020 will be decisive in terms of building the kind of Italy we all hope to see.



# OPTIONS FOR RELAUNCHING ITALY IN 2020



# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## THE MOST WIDELY-AGREED MEASURES 1 DIGITALISATION OF THE COUNTRY

If we ever hope to be competitive as a Country, the digitalisation of our processes will result both in significant cost savings, which is an effective competitive weapon in terms of exports, and facilitate our entry into the emerging markets of the future. We will need to start with basic infrastructure such as ultra-broadband to support the development of our services, or electronic identity cards which, it is estimated, could alone increase Italy's GDP by 3%.

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The emergency has ushered in a major break with the past. The Italy of 2023 should be at the forefront of technological renaissance, in other words a country in which technological development becomes the means to achieve the kind of a cultural, social, democratic and economic development that will hopefully not leave anyone behind or, at the very least, looks at the pluses.

*Guido Scorza*

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Digital identity (we have already discussed the why, so we must just get on with it because it would be a fatal error to miss the opportunity) is the cornerstone of building digital infrastructure (networks and applications).

*Manca Daniele*

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If phase 3 is to be the reconstruction of our entire economic system, then the biggest mistake we could ever make would be to rebuild it exactly as it was prior to the crisis. It is essential that we make at least a portion of any financial aid (or loan guarantees) we may provide to businesses conditional on the beneficiaries agreeing to spend more on digitalisation.

10% of our GDP should be allocated to building digital infrastructure in the Country, applied research activities and technology transfer aimed at strengthening the Country's manufacturing base and its capacity to reach end-users in an innovative, data-driven and super-efficient/effective manner, thereby closing the existing productivity gap between our Country and our peers.

If the objective is to drive up productivity and thus increase salaries, and to encourage the repatriation of manufacturing facilities and thus create new jobs and finally start growing again, then it's a case of now or never.

*International tech-company Manager*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 2 INVESTMENT IN TRAINING FOR NEW JOBS

At times of deep economic crisis and rising unemployment it is essential that people are trained for new jobs as they come about. Training is changing in many ways. Firstly, there is need for ongoing training as the job skill requirements change in keeping with the evolution of the various trades and professions.

Therefore, it is no longer possible to train people at the start of their working life and stop at the doors of universities. It's important to develop new training programmes, which entails the utilisation of technological distance learning tools such as e-learning, as well as new methodologies, such as the back-to-front classroom, where people get together only to work on skills that they have already learned.

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Education 2.0. Innovation is redefining everything, including our home lives, business, science and everything else that we do, except for education. In a world in which knowledge is becoming ever-more accessible, programmes and methods have to be transformed so as to focus on the student's analytical skills, provide a more in-depth understanding of key concepts and applied knowledge rather than the mere ability to recall rote-learned facts. We really need to implement techniques such as peer-to-peer learning, enquiry-based learning and personalized learning, via centralised platform, to manage school programmes and be able to assess students in real-time, both within our schools and remotely.

*Gianmauro Calafiore*

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Investment in training, education and research: our Country is still one whose wealth still relies on the processing of raw materials, most of which the Country has none of its own. The Country's manufacturing and creative capabilities have always been based on its ability to process the raw materials via a widespread network of talent and a strategic communal ability to envision both the product and the market. Then we stopped investing in schools, educators and research. The resulting drop in competitiveness killed our growth.

*Luca Josi*

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As regards education, Italy starts off with figure of 19% graduates in our total population of 25-64 year-olds (half that of the OCSE average). Therefore, it's important for us to invest more in education by providing our universities with more resources and greater independence to develop educational programmes that are more in line with the needs of the areas in which they operate. Access to a university education must continue to be universally available to everyone, so resources must be allocated to assisting all promising students facing financial hardship, who would otherwise be unable to afford a university education.

*Valerio De Molli*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 3 ENHANCING TERRITORIAL RESILIENCE

The Country needs to become more resilient to future negative events. It's an investment that will pay for itself in the long term, but it's also what we need now to enable us to employ people. If the old Keynesian economics saying is true that it's better to pay people to dig holes and then to re-fill them simply to ensure that the cash goes around, in the meantime we may as well plant more trees since the jobs involved will be useful for society. Territorial resilience is like an insurance policy for the Country and its citizens, an investment that will pay for itself the very next time we experience an earthquake, drought or flood.

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Abandoning environmentally and financially unsustainable major construction works (such as the TAV in the Valsusa valley) in favour of maintaining existing infrastructure and containment of land exploitation.

*Luca Mercalli*

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Investing in retrofitting homes to make them more energy-efficient and earthquake-proof.

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Land-erosion and instability in the Country is not yet irreversible, but is close to being so in many areas, so we really need to intervene quickly and extensively.

*Domenico De Masi*

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## 4 INVESTMENT IN HEALTHCARE

The resilience of a Country also depends on the health of its citizens and that of a company depends on the health of its employees. The best case in point is the German healthcare system, which has twice as many hospital beds as the Italian healthcare system and is proof that no healthcare system can really afford to have to choose whose life to save. The healthcare system must also be resilient to pandemics and must evolve by using digital technology. Family doctors handing medical scripts through the window to patients lined up on the pavement outside could well become a thing of the past if we equip ourselves with remote consultation and telemedicine tools.

“

In the next 6-12 months we will have to invest heavily in the necessary resources to manage the transition process from pandemic to endemic, more specifically by setting-up a medical/scientific monitoring structure and a flexible response to any potential resurgence of COVID-19 or the advent of other “new” illnesses.

*Guido Silvestri*

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## OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

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Thanks to the Corona virus, the healthcare system was fortunate enough to appear before us in all its glory, however, the cracks soon began to appear and the fear of a spiralling death-rate was sufficient justification for a total about-turn in policy. Whereas before the trend was cut funding to this sector, now everyone is rushing to re-finance it and thus shifting the priority back from private healthcare to public healthcare.

*Domenico De Masi*

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The healthcare world has been totally transformed by digital technology. The same is true of biotechnology and, as the use of other exponential technologies such as genome sequencing speeds up, the treatment of all other illnesses will be radically overhauled. The future of biomedical research envisages the sharing of all data without exception and future investment will focus on prevention rather than treatment. The future of everything from genomics through to epidemiology and immunology will be managed by Big Data so as to enable the creation of a customised diagnostic list of symptoms for every known disease. Our mentality will change from focusing on “sick-care” to fully-fledged “healthcare” and the medical world will move from reactive care to proactive, preventive and ongoing care.

*G.C. Medical Practitioner and Professor*

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## 5 INVESTMENT IN THE NEW ECO-FRIENDLY ENERGY SOURCES

Investment in energy has been the main cornerstone of every economic transition in our history. These days we are witnessing yet another transition, in which the cost of energy from renewable sources is dropping to below that of energy from fossil fuels. This, combined with the fact that global warming is fast becoming an almost insurmountable problem, has to be our starting point. Whoever is first to convert their existing grid into an intelligent energy and electricity distribution network will not only become less dependent on outside energy sources, but will also have a proven concept that can be exported worldwide.

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The process of profound decarbonisation requires an overall energy-provision investment that could add up to as much as 130 billion Dollars. However, in exchange, such investment would provide huge socio-economic benefits. More specifically, transformation of the energy-provision system could provide a much bigger contribution global GDP than that of the current energy-supply operations, which are forecast to contribute 98-trillion Dollars between now and 2050. In addition, it would also guarantee 42 million new jobs in the global energy sector.

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The cities, as such, are much better suited energy-wise and it is already patently clear that we need to try to switch away from fossil fuels in order to ensure the sustainability of the system as a whole. One potential solution may be to speed-up investment in more sustainable energy resources.

*Paolo Benanti*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

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This is the type of industrial policy investment plan that, also through the creation and expansion of hybrid public-private funds, is able to develop an integrated ecosystem made up of new and more innovative enterprises, SMEs, larger corporations and financial markets aimed at economic/production and social restructuring based on social and environmental sustainability.

Equally essential in this regard is the adoption of tax policies aimed at discouraging the use of negative types of energy and production sources.

*Venture Capitalist and Entrepreneur*

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## 6 INVESTMENT IN RESEARCH AND DEVELOPMENT

Investments in research and development are the only ones that enable the Country to remain competitive. There's no question when it comes to deciding whether to work for with companies or ideas that belong to the past, or rather those of the future.

These days, no one would choose to work for Kodak rather than Instagram, or for Blockbuster rather than Netflix, simply because anyone without the courage to innovate will simply drop out of the market. Italy invests 1.3% of its GDP in Research and Development, Germany double that figure, Sweden three times as much and South Korea four times as much.

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We need to redirect the unproductive portion of public spending, namely the number of people and the remuneration of both the central public administration and the regional administration apparatus, to favour investment in research, training and economic development. Then we must raise the proportion of GDP invested in research to 3% in line with the average investment rate of the more virtuous Countries, and create the post of “Chief Scientist”, who will be in responsible for guiding and strategic prioritising for research and development of Hybrid public/private funds designed to convert research potential into innovative entrepreneurship.

*Venture Capitalist and Entrepreneur*

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We need to invest (really invest) in research and to create flexible models such those of the EPFL in Lausanne and the Weizmann Institute in Tel Aviv, with hybrid public/private investment strategies whose objectives do not clash with our own values. We need to take the example from the those who design complex systems and the criteria they use.

*Barbara Carfagna*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 7 ESTABLISHMENT OF CLEAR EMERGENCY PLANS FOR THE FUTURE

It is important to invest in setting up emergency plans to be used as and when necessary, so as to avoid having to make hasty complex decisions at times when it may not be possible to involve all the necessary people. These plans include emergency legislation to be drafted when things are quieter, as opposed to having to pass hastily drafted emergency decrees that then need to be constantly updated.

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Identification and protection of the more fragile patients. Serious crises that cause shock can, in the end, provide positive ways in which to reconsider what is best for all and basic human rights. The data that is emerging from our analysis of the COVID-19 pandemic has brought to light multiple clinically co-dependent medical conditions for which we will need to draw up emergency treatment plans to better protect such patients in future.

*G.C. Medical Practitioner and Professor*

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## 8 SUSTAINABLE MOBILITY INFRASTRUCTURE

One of the major changes that occur in every industrial revolution concerns the transport system. The way we get around is set to change and will, at least for the next while, be more individual in nature. The sustainability of our public transport system will be fundamental in terms of enabling us to ensure zero environmental impact and to potentially be able to export tried and tested Italian solutions abroad.

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Cities and neighbourhoods with no cars and only private transport that is exclusively zero-impact on the environment and the people.

*Daniele Manca*

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New technologies and sustainable mobility. We will have taken this opportunity to invest in the new technologies and a totally new, more sustainable and people-friendly concept of mobility. This will have cut costs globally, not only in financial terms, but also in terms of the environment and human health.

This option, which comes at a total cost equivalent to 10% of GDP, would assure us a more solid country with more job opportunities, new innovative businesses and new, more sustainable and less costly technology solutions. These measures would be not be aimed at solving a pressing problem, but rather at increasing the overall systematic resilience of the Country as a whole.

*Giorgio Metta*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 9 PROVIDING PERSONAL INCOME SUPPORT AND LIQUIDITY FOR COMPANIES

Companies with a bright future simply cannot be left to fail. The corporate credit system is based on faith in the overall trading system itself, i.e. the belief that the customer will pay for our goods, therefore the firm can go ahead and place orders on credit with suppliers or commit itself to engaging and paying workers. Should this faith be broken, it would create problems not only for the firm itself, but for everyone all the way down its supply chain. The same is true of people's disposable income, which must be sustained for them to survive and to ensure the sustainability of the production system.

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The only real option we have in 2020 is to provide personal income support so as to prevent a general drop in consumption across the board, and then to take a really close look at the reasons why the situation in the Country has constantly deteriorated in the past few decades and indeed even faster in more recent years. The smartest choice the country can make is to recognise that everyone has to take their fair share of the blame for that decline. That way, perhaps we will stop blaming others, avoid the humiliation of having to hold out the begging bowl to those that have done better than us and, instead, roll up our sleeves to get our country going again. We could start by figuring out why the Lombardy healthcare system faced the catastrophic debacle that we all witnessed while the German healthcare system was able to deal with the crisis very effectively indeed.

*Franco Bernabè*

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For everyone that lost their jobs in 2020, the State should pay out subsidies sufficient to cover their lost income for the months in which they were unemployed in 2020.

*Businessman and Healthcare Economics expert*

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This crisis, as with all other crises, is going to hit the weaker members of our society the hardest, namely the people who were already poor before the onset of the pandemic and those who will be hardest hit due to the nature of their jobs. What we're talking about here are around three million "newly poor" people as a direct result of the Corona virus emergency. The system needs to act now to protect these people by adopting ad-hoc income protection measures aimed at providing liquidity to plug the inevitable gaps that have emerged during the past few months, also because, once the emergency has finally ended, people will need to have the necessary cash to start consuming once again. The Government will have to take immediate action to deposit funds directly into the bank accounts of people with an annual income of less than €40,000, also taking other factors into account, such as number of children and/or elderly dependents. We're talking here about 36.6 million taxpayers (equivalent to 88.7% of the total).

*Valerio De Molli*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 10 INVESTMENT IN THE GROWTH OF BUSINESSES WITH PROVEN POTENTIAL

The State will have to choose which businesses to assist since there are insufficient resources to help everyone. That's why it will be important to invest in businesses with good prospects in terms of growth potential and future financial viability.

If not, it would be better to invest in training people to prepare them for new jobs, or indeed in corporate restructuring, rather than attempting to rescue businesses that may never be financially viable in future.

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We currently have a debt to GDP ratio of 140%. In a few years time that figure will have risen to over 160%, at which point the Country will be technically bankrupt. The only way we will ever be able to repay the debt is by generating additional value. To put it bluntly, only help sound businesses with cash-flow problems. Avoid investing in insolvent businesses because that would be a waste of money. Assist borderline businesses to get back on their feet by coming up with new products, organisational restructuring, etc. The most critical stage will be in 2021, when declining tax revenues may cause a dangerous bottleneck.

*Roberto Poli*

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Allow companies to zero their statutory provisions for 2020 (at zero cost to the State), and sterilise the tax implications, so as to lower their operating costs and thus also strengthen (or weaken less) their net assets.

*Businessman and Healthcare Economics expert*

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Recapitalise businesses that have been obliged to take on more debt.

*Innocenzo Cipolletta*

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# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## THE MOST CONTROVERSIAL MEASURES

### 1 MAKING THE STATE BECOME THE DRIVING FORCE FOR INNOVATION

The State must support innovation, as the United States has already done by supporting and promoting all kinds of basic research. All the new jobs created in Italy in the past 10 years, i.e. 600,000 in all, were created by businesses that were less than 5 years old. In the United States, businesses less than 5 years old have created over 2 million new jobs in the past 20 years. Businesses that are over ten years old are cyclical and are, therefore, only able to create jobs when the economy is flourishing. It is important to favour the birth of new businesses simply because they are the only ones that have really managed to create new jobs in times of crisis. We could, for example, set up a Darpa-like plan to promote the transfer of technology to the entrepreneurial world.

### 2 CRACKDOWN ON TAX EVASION

We need to bring the level of tax evasion in our country down to the European average. The public's forced acceptance of the use of electronic tracking systems to control individual movements during the pandemic will also have enabled the authorities to use the improved network to keep track of tax evasion. "If Italy were to be able to reduce tax evasion to the average level within the EU, the resulting additional income for government would be sufficient to zero this Country's budget deficit (around two percent of GDP) and indeed to leave us with a significant surplus as well." (as per the AGI policy report card of 26 September 2019). The extra money could be entirely allocated to education as a true 'weapon of defence' for the Country.

### 3 INVESTMENT IN THE SOUTH

The South, which has no sound multinational companies, does however boast no less than four major multinational criminal organisations, namely the Camorra, the Mafia, the n'Drangheta

and the Sacra Corona Unita, which are already meddling in the economic and social life of the entire Country. It is precisely on this area, which covers around a third of the entire country that we must focus our planning, economic and social efforts aimed at reversing the centuries-old trend of a widening gap between the North and the South. We could consider the option of setting up remote-working software development businesses in 4 key regions (Sicily, Puglia, Campania and Calabria) with guaranteed minimum salaries for everyone that works for them.

### 4 INVESTMENT IN A NEW SCHOOL EDUCATION MODEL

We could kick-off the 2020/2021 academic year with a totally new hybrid physical-remote lesson education plan with lessons spread out over seven days a week, including during the summer months and the distance learning concentrated during the autumn and winter months, and consider sending the older teachers on early-retirement to make way for younger teachers specifically trained in distance learning methods.

### 5 ENHANCING STATE INDEPENDENCE

Invest in reducing the Country's reliance on foreign energy sources and its foreign debt. In order to ensure independent energy supplies, we should build state owned mega-power generation plants to provide energy from renewable sources such as solar-power (for which Italy is ideally suited) and wind-power, with energy accumulation facilities located all across the country so as to totally eliminate the Country's need to purchase coal, crude oil, gas and electricity from abroad. This would enable us to drastically reduce the cost of energy provision to industry, heating plants and transport facilities and thereby make Italian companies more competitive than their foreign counterparts. We could also manufacture solar panels and accumulators right here in Italy so as to be able to meet our own internal requirements and, at the same time, become a global leader in sales of green infrastructure to other countries.

# OPTIONS FOR RELAUNCHING ITALY IN 2020

the most widely-agreed measures

## 6 UTILISING CULTURE AS AN ECONOMIC RECOVERY TOOL

In anticipation of increased automation, we need to invest in a sector with low establishment and management costs but high employment potential, such as the cultural sector in the broad sense, in other words, including our historical and artistic heritage and tourism, the creative industries (fashion, design, cinema and entertainment) and schooling, not forgetting culture in the “high” and academic sense in terms of attempting to overtake France (which we almost succeeded in doing previously, but failed precisely in this field) and gain the necessary cultural prestige (i.e.: being the “cultural capital”) for us to be able to export products that are in any way culture-related.

## 7 MINISTERIAL ECONOMIC SCENARIOS

Right now is the ideal time to proceed with the task of redesigning the future of government institutions. Herewith, very broadly speaking, are some examples of what we could do: (a) Mandatory development of future scenarios by all of our Ministries, major Directorates and Town Councils; (b) Introduction of multiple long-term economic/policy documentation (four different 20-year or longer scenarios); (c) Analysis and restructuring of incentives so as to progressively eliminate any that are either unsustainable or contrary to the Country’s future requirements (a process that is already underway but is apparently not particularly well-supported); (d) Introduction of medium to long-term studies of future impact of decisions; (e) Introduction of feedback mechanisms to enable us to understand whether the decisions made are delivering the desired results.

## 8 FOCUSING ON MAINTENANCE RATHER THAN ON MAJOR PUBLIC WORKS

Abandoning environmentally and financially unsustainable major construction works (such as the TAV in the Valsusa valley) in favour of maintaining existing infrastructure and containment of land exploitation.

## 9 REGULATING THE PERSONAL-INFORMATION MARKET

Personal information: all the way from protection to control. Problems relating to personal information have become a common feature in everyone’s daily life and the political response to these problems thus far has been vague and fatally flawed by ideological prejudices, incompetence and confusion. The rules and the solutions implemented to date reveal a total lack of understanding of the actual problems and the potential opportunities. However, this is an aspect on which the future of any advanced economy depends and, therefore, the hope is that, at least in this area, the slogans and prejudices won’t condemn us to the kind of backwardness from which we may never recover, as has unfortunately already happened in other fields. We therefore have to switch from viewing personal information as a “threat” against which we need to “defend ourselves” to viewing it as an “opportunity” to that we can “control”. This is the only way we can hope to remain on the cusp of innovation, otherwise this sector too will be dominated by other countries. Full stop!

We need to invest in the search for new forms of development and interaction by means of data and digital architecture.

## 10 ZERO-IMPACT MOBILITY FOR VILLAGES AND NEIGHBOURHOODS

The de-population of our metropolitan cities that will continue as a result of remote working will help to enhance the attraction and investment potential of our non-metropolitan towns, which will begin to attract new investment. We could start with these towns and turn them into car-free towns and neighbourhoods with other forms of private transport, but only those with zero impact on the environment and on individuals.

# CONCLUSIONS

Davide Casaleggio

2020 will signal a major turning point for all Countries. The pandemic has made us all realise the importance of having a reliable and dependable healthcare system based on the requirements in times of healthcare emergency rather than on outright efficiency. The one major difference between our healthcare system and the German one is that the latter has twice as many intensive-care beds than ours and their system has never got to the point of having to choose who to save and who to abandon to their own fate. Our top-priority is, therefore, to totally rethink our healthcare system, not only in terms of how much we need to invest, but also how to go about utilising and building a modular, widespread, digital system that is able to deal with any potential future healthcare emergencies.

This pandemic has also had an impact on the economy, and a particularly tragic one at that. This year the Country will probably have the highest number of unemployed people that we've ever seen in the past century. While the financial measures to bolster the economy may well be very useful in the immediate future, we must also consider the systemic impact that these will have on various market sectors, especially if we take international competition into account.

We will have to inject an sum equivalent to 15% of GDP into the economy to keep it afloat and help it to recover. That's equivalent to 10 years' worth of annual financial budgets concentrated into just one single year, which will presumably rob us of the opportunity to make further economic investments in the coming years, unless the decisions we make in 2020 are able to create added value to be redistributed in future.

That is why we say that the decisions made in 2020 will re-design Italy's future over the next ten years. Investing in the wrong things could well jeopardise the Country's ability to support the economy in future.

The shock to the economic system has also speeded up the pace of change. Changes that would normally have taken decades to happen have instead occurred in just a few weeks. Universities like Harvard have digitalised all of their courses in a single month, thereby instantly sweeping away one of the biggest single entry barriers to tertiary education for many people, namely the cost of University campus accommodation. Embracing innovation has always been a very slow process for various reasons, including culture, financial status and even a lack of understanding of its importance. However, 2020 has obliged everything and everyone to speed up and now, anyone who has lagged behind will be knocked out of the game by international competition.

Innovation has taken on a totally new meaning, not only in terms of the evolution of market sectors and manufacturing methods, but also in terms of the resilience of communities and Countries. It's no mere coincidence that all of the major investments that have emerged as such from this study revolve around giving people greater security by means of personal training, territorial protection and remote access to public services. Many existing behaviours that impact on the equilibrium of various economic factors will also change. For example, a midtown studio apartment will no longer be worth as much as a country house, notwithstanding the fact that, until very recently, their respective prices and everything linked to them were very comparable. Businesses based on pure folly will feel the pinch, starting with our tourism sector, which contributes 13% of this Country's GDP and provides around 4.2 million jobs. The decisions made in 2020 will have an exponential effect on whether our economy recovers or instead becomes a subsistence economy.

# CONCLUSIONS

Davide Casaleggio

1



Digitalisation  
of the Country

2



Investment  
in **training**  
for new jobs

3



Enhancing  
**territorial**  
resilience

4



Investment  
in **healthcare**

5



Investment in the  
new **eco-friendly**  
**energy** sources

6



Investment in  
**Research**  
and **Development**

7



Establishment of  
**clear emergency**  
**plans for the future**

8



**Sustainable**  
**mobility**  
infrastructure

9

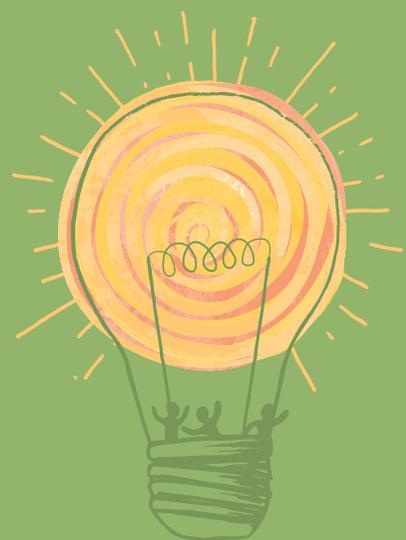


Granting personal  
income **support**  
and **liquidity**  
for companies

10



**Investment**  
in the growth  
of businesses with  
proven potential



ASSOCIAZIONE

GIANROBERTO  
CASALEGGIO

# THE FUTURE OF TIME

The world after Coronavirus

# THE FUTURE OF TIME

The world after Coronavirus



# THE FUTURE OF TIME

The world after Coronavirus

The future is foreseeable, until the unforeseen happens.

After the Covid-19 pandemic, history has been fast-forwarded by 10 years. And change arrived even before we could understand it.

Just as happened back in October 1582 when, in order to adopt the Gregorian calendar, the Pope ordered that everyone skip 10 days in that month, thus making it **the shortest month ever**, just 21 days long. Even then, workers received their full month's wages even though they didn't work for those 10 days, just as happened in 2020 with the Corona Virus Lockdown, when companies and workers received financial support for the period that they were under enforced lockdown at home.

Civilizations have always tried to synchronise their times so as to feel more united.

It was probably Augustus to start, in the year 18 B.C., ordering people to rest for the entire month of August after the harvest and before sowing the new season's crops. Four hundred years later, Emperor Theodosius made Sunday a compulsory day of rest, starting the weekly rhythm as we know it.

Agriculture gave society the monthly rhythm, religion gave it the daily one.

The first thing Robinson Crusoe did after being shipwrecked on the island, was to build himself a calendar so that he would know when Sunday came around and thus continue to feel like he was still part of the community from which he'd been separated.

We then had to wait for the mass media of the 1900s to get into the rhythm of **daily hours**, with peak hours to go to work and prime time to watch the same films on TV. Then, along came the social media that got us in sync in real-time, with responses or likes appearing within just a few seconds. We began to feel like citizens of the world, as we all simultaneously were a global community.

In **2030**, time is no longer what puts us in sync, but rather the reality of talking about the same issues via the social media. We created a society that processes thoughts in unison.

Society has become asynchronous. Prime-time television had already given way to watching movies on Netflix or Prime Video whenever it suited us. We preferred to communicate via

WhatsApp messages rather than phone calls. After the big leap, we cultivate the foods we prefer in vertical vegetable gardens in a perennial springtime. Holidays are not necessarily in August. Even peak-hour has ceased to exist. Remote working, which was being tried out by half of US workers and only 5% of workers in countries like Italy prior to 2020, has become the rule rather than the exception after the pandemic and has become a workers' right. All of the "physical" jobs done by the masses are automated and suddenly the work of storemen, cashiers, drivers and even production workers, if not yet replaced by robots, are done remotely.

Children no longer go to **school all** together but have flipped classrooms in which theory lessons are done online at times that suit everyone and the practical application of the theory learned is done in person in workshops.

The concept of **opening hours** during which services can be accessed have disappeared. Cities and States become self-service and online. The new digital passport recognised by the UN enables any citizen of the world to identify him/herself remotely and access any services to which he/she is entitled, whenever they like.

In **2054** the last mass synchronisation that we have dragged along with us as part of our civilisation also falls away. With the cost of energy having dropped to zero, everyone decides when to sleep: some opt for Tesla and Leonardo da Vinci's polyphasic method with a rest period every 4 hours, without the night, while others prefer to adopt Einstein's idea of 11 straight hours of sleep.

The main issue is no longer focus on the schedule imposed by mass media and society, but rather on communal interests. Ideas will be the thing that sets the pace and time will no longer be the main factor that governs our society.

The economy itself has changed. After 2020, business models are all aimed at developing resilience. Whereas in the past the symbol of success of a business used to be the unicorn due to its uniqueness, now it's the camel due to its ability to overcome lengthy difficult periods. Efficiency-based business models fail and the so-called sharing economy stops, partly due to the peoples rising mistrust about touching other people's things. It's replaced by the resilient economy, an economy based on a continuous time, on flows and not on individual transactions. Goods such as detergents and muesli arrive at home when they are

# THE FUTURE OF TIME

The world after Coronavirus

needed and we don't have to remember to put them on our shopping list. Energy supplies in our homes are contracted on an ongoing basis by our virtual agents that choose the most convenient and sustainable supplier or barter any excess energy generated by the home for other services we need.

Remote working is not compatible with traditional, control-based hierarchical systems and companies begin reinventing themselves on the basis of holacratic organisational models with decentralised management responsibility. The multinationals the leaders of the last century, are to be replaced by company federations based on resilience and linked by technologies like blockchain, which acts as guarantor for all.

A new kind of company emerges, known as a B-corp or Benefit Corporation, which is not focused on distributing profits to shareholders but rather on providing value for stakeholders. Their focus is on the value that the company is able to generate for the community.

GDP is thus also abandoned to measure the economies of States, which does not come to celebrate the hundred years since its adoption in 1944.

The new index is the value of the state, the value of the community for its citizens. Decisions regarding renewable energy sources will become strategic not only in terms of employment, but also in terms of the Country's resilience. Houses become with negative energy consumption and sell the excess energy to the production plants.

**Technology has speeded** everything up. In just one year, everything has gone beyond the tipping point for change. Last century's Moore's Law, based on time, according to which the processing speed of electronic chips would double every 18 months was surpassed in the 2000s by Wright's Law, according to which it's not time that matters, but rather economies of scale that drive down costs exponentially. Coronavirus has forced to reinvent proxemics, namely the management of personal and social space, city transport and above all has made it advantageous to live outside the metropolis with the consequent collapse of real estate values and the disappearance of the concept of urban periphery, with the revitalization of the value of small towns.

Countries that have not had the courage to embrace change are called **"Third-Time" Countries.**

They have remained locked in the past, supporting the old-fashioned idea of work and have thus found themselves cut out of the new economy, with unsustainable rates of unemployment that lead to social unrest and mass emigration. Their wealth distribution is no longer bell-shaped with few rich people and few poor people, but is instead **elephant-shaped** with many poor people, few rich people and no middle-class.

The US had to reconstruct a social-welfare state in which people do not have to choose between either having food to eat or getting medical treatment. China has had to give up on centralised government control of the economy in order to make it more equitable and sustainable.

Countries that had prepared themselves by investing in **technological resilience**, like Estonia and South Korea, have instead managed to achieve the so-called "Tiger's leap" and have found themselves leading the pack towards the new concept of evolution; thanks to their infra-regional rather than global supply chains, with investments in sectors such as energy decarbonisation and intelligent energy grids that have created millions of jobs around the world and even introducing new digital citizenship rights such as the right for everyone to have ultra-broadband connectivity and ability to decode their own DNA, to prevent diseases in a targeted way.

Every civilisation has always counted time as from when it began. 1278 years after the foundation of the city of Rome, a monk established a new starting point, namely the birth of Jesus Christ. That was back in 525 A.D. and for the past 1500 years we have been using this system based on a religious event. In the same way, the Islamic community uses the moment when Mohammed left Mecca whereas the Hebrew community uses the birth of the planet according to the Bible.

In the future, time has a new beginning. The mental space of people is no longer occupied by the scanning of time, but by that of ideas that only an interconnected civilization can understand. Each time starts from the last idea that we haven't achieved yet.

**Man is once again the master of his own time.**

## ACKNOWLEDGEMENTS

In addition to thanking the 36 experts that participated in this project, we wish to highlight that all our initiatives are only possible thanks to the members of the Gianroberto Casaleggio Association who continue to support us enthusiastically and spur us on year by year. Our thanks also go out to all those people that have chosen to help us keep Gianroberto's ideas alive by donating to our cause.

Finally, we wish to thank journalist Antonino Caffo for his valuable contribution towards the compilation of this report, and to Liuk Design for the graphics and layout.

## METHODOLOGY NOTES

The aim of this investigation was to, in a very short space of time, attempt to fully grasp the views of various opinion leaders and experts in a broad range of fields regarding the changes that are currently taking place. Therefore, this document is not intended to be a purely statistical report, nor much less a plan of action, but rather a response, consisting of ideas and opinions, to the pressing need for increased clarity as regards the future.

The co-ordinating committee of the Association originally conceived this initiative at the end of March 2020. The thought was to utilise a modified and adapted version of the Delphi Method that could ensure rapid completion of the task and exclusively digitally due to the lockdown.

### The Delphi Method

*The Delphi Method is an interactive systematic forecasting method based on input from a group of independent experts. The carefully selected experts are required to respond to two or more rounds of questionnaires. After each round, a facilitator compiles an anonymous roundup of the experts' opinions in the previous round and the reasons they gave for their opinions. Participants are then encouraged to review their opinions in light of the responses from other members of the group. It is believed that during the course of this process, the range of responses will diminish and the group as a whole will progressively converge on the "correct" answer. In many cases, group forecasts have proven to be more accurate than the individuals' forecasts. The Delphi technique is often used in situations where there is a lack of consensus and agreement on which interventions and/or solutions to adopt.*

Source Qualitapa.gov.it: <https://bit.ly/2zjLeju>

# ACKNOWLEDGEMENTS

## METHODOLOGY NOTES

Herewith the precise path that we followed, in detail:

On the 9th of April the members of the Gianroberto Casaleggio Association were asked to propose the names of experts that, in their opinion, should be asked to participate in this initiative. Thanks to the responses received, various other proposed experts, past-speakers from previous SUM events and other people that had expressed an interesting vision of the future were approached to get involved. Notwithstanding the critical times in which the investigation was conducted, in the end, a total of 36 experts were actively involved and participated in the survey.

It is very difficult to accurately circumscribe the experts' respective professions given the broad span of their expertise:

8 Managers (in various fields), 5 Entrepreneurs/businessmen, 4 Sociologists, 3 Journalists, 2 Attorneys, 2 Professors, 2 Intellectuals, 1 Theologian, 1 Economist, 1 Climatologist, 1 Scientist, 1 Gourmet, 1 Architect, 1 Virologist, 1 Medical Practitioner, 1 Notary and 1 Venture Capitalist. Overall, 11 of these individuals also lecture at University level.

In Phase 1, on 15 April the following two questions were sent off to each of the experts:

- **What are the irreversible changes (maximum 5) that the Corona virus will make in people's lives from 2021 onwards?** (What you think will occur, not what you hope will occur). (to be described in one or maximum two paragraphs each)
- **Imagine Italy in 2023 as a Country that has managed to translate the Corona virus drama into a major recovery. This will only have been possible thanks to certain intelligent choices made in 2020.**

**What were these choices (maximum 3)? In what will the Country have invested 10% of its GDP? What impact will these have had on GDP, employment and on that new Italy that would be really great to live in and build upon?** (to be described in one to four paragraphs each)

The numbers of responses returned within a week were as follows:

153 proposals to the first question and 111 proposals to the second question.

All the various proposals were categorised and assigned a heading.

Phase two began on 24 April and the participants were asked to, within 10 days, assign a personal rating of between 5 and 1 (Fully agree/Totally disagree) to each of the proposals, with space alongside for comments. At this stage the people had no idea whatsoever of the name or job of the respective author of each proposal so as to ensure a higher level of objectivity.

Analysis of the individual responses led to them being grouped into macro-areas, with the aim of reducing down to the 10 concepts on which there was majority agreement and the 10 that were most disputed, excluding those on which there was too little agreement. The themes were then examined in more detail so as to identify their respective distinctive features, important cases and future prospects.

Finally, in order to complete the Eisenhower matrix and create some semblance of order with regard to priority, the members of the Gianroberto Casaleggio Association were asked to place the 20 measures to be adopted in 2020 to re-launch the Country in relative order, based on their personal perception of their relative urgency.

The relevance of the elements that were so dear to Gianroberto Casaleggio is clearly evident: digital technology, the environment, moral conduct and focus on inequalities emerged as key topics of discussion for the future.

It is, however, important to note that the end-result of this investigation does not represent any pre-existing specific position held by the Association, but is rather a combination of ideas and concepts that are widely shared by a varied group of people, each with their own respective ideas, backgrounds and experience.

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