

Gov20 20



The world
around us
is changing
at a

dizzyi
ng pace.



Technology

that was once
seen only in
science fiction
films now sits
in the palm of
a hand.





Societal apathy that once
seemed insurmountable has
made way
for organizations, individuals,
and entire markets working for
social good.

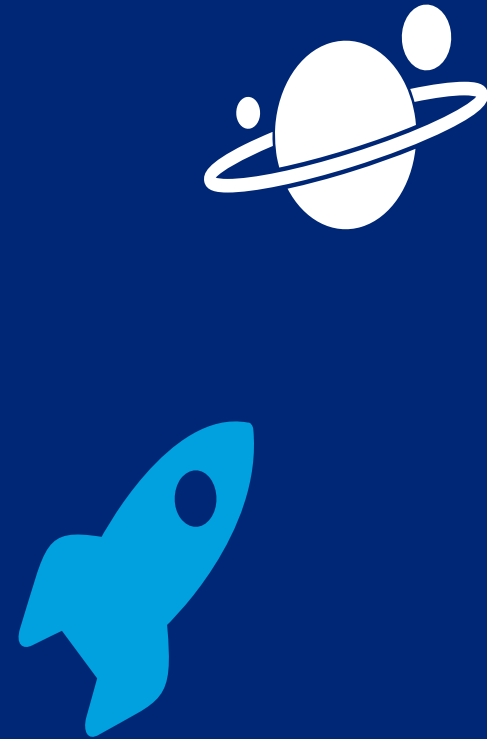
Innovative business
models
and enterprises that
previously considered
laughable are
not only succeeding, but
scaling rapidly.



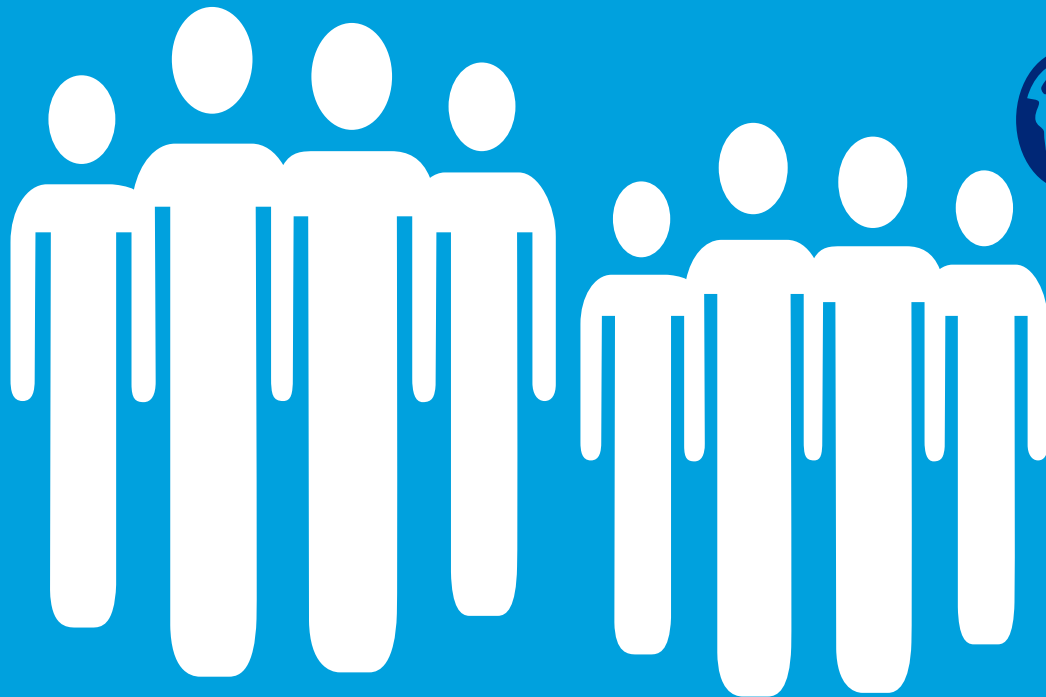
At this rate, the world
will **2020.**
look quite different in



What is driving these
unprecedented
shifts in our global society?



Demographic drivers are altering the composition of the human population.



An aging population grows in the West.



The improved socio-economic status for women brings billions more people into the workforce.



Mega cities burgeon especially in slums of emerging markets.



The East outgrows the West.

Increased global migration and mingling of cultural identities leads to the rise of the truly global citizen.



Economic drivers are causing business to rethink their products, services, and operations.



The West moves towards a world characterized by abundance, but increased urbanization, rising standards of living, and consumerism put pressure on scarce resources.



A growing class of consumers in emerging markets is driving companies to reconsider products and innovation.

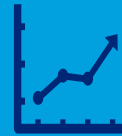


As businesses continue to evolve to meet the needs of evolving consumer demands, the need for radical transparency grows.

Technological
drivers are changing
everything — from
how we work to the
way we
communicate.



The “Internet of Things” pushes businesses and governments to revise models.



Analytics are leveraged to create insights from a treasure trove of data.



3D printing ushers in a second industrial revolution.



Currencies take on new digital and data-based forms.

Societal drivers are redefining how we interact and overcome our greatest public issues.



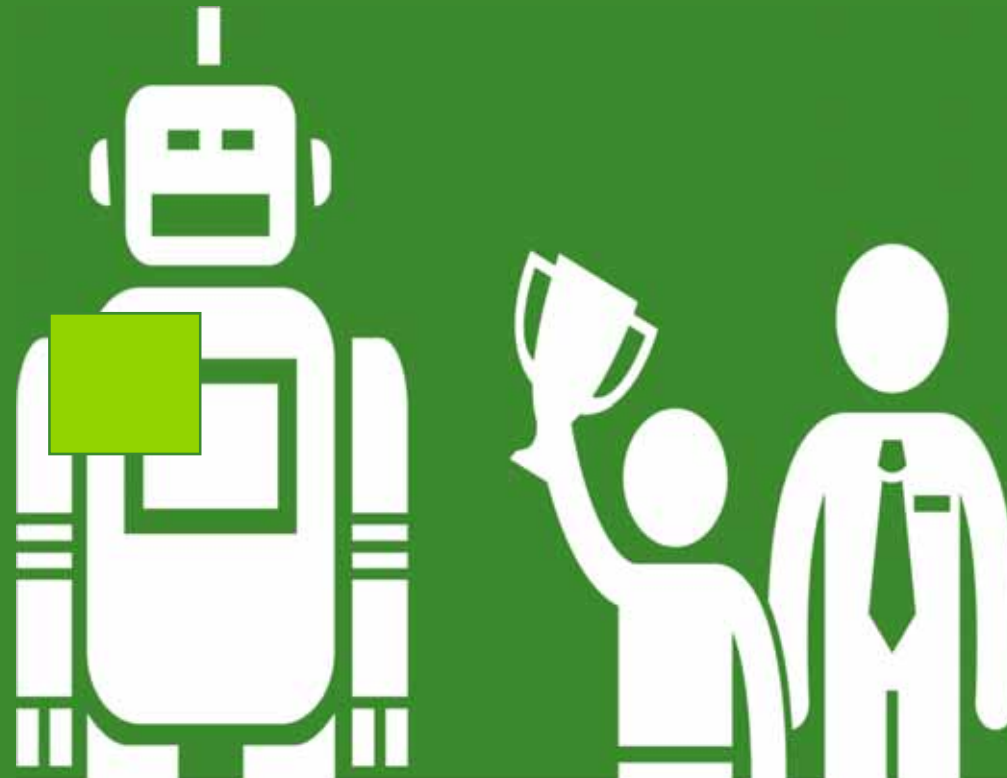
Society grapples with the undesirable effects of a hyper-connected, digital lifestyle.



Social consciousness surfaces, with more organizations and citizens contributing to societal change and driving a renewed sense of openness, innovation, and empowerment in 2020.



To keep pace with the needs of its citizens, government too is **evolving** in unprecedented ways. It is deviating from tradition and creating an environment where innovators thrive and technology-equipped citizens can serve themselves.



As these changes spill over into the next decade, 2020 sees government take on a powerful new role — going from problem solver to network **integrator and solution recruiter.**



The opening up of data,
crowdsourcing policy, and co-
creation of services herald the
shift to **distributed
governance.**



Predictive analytics, behavioral psychology, and outcome-based regulation translate into **smarter decision-making.**



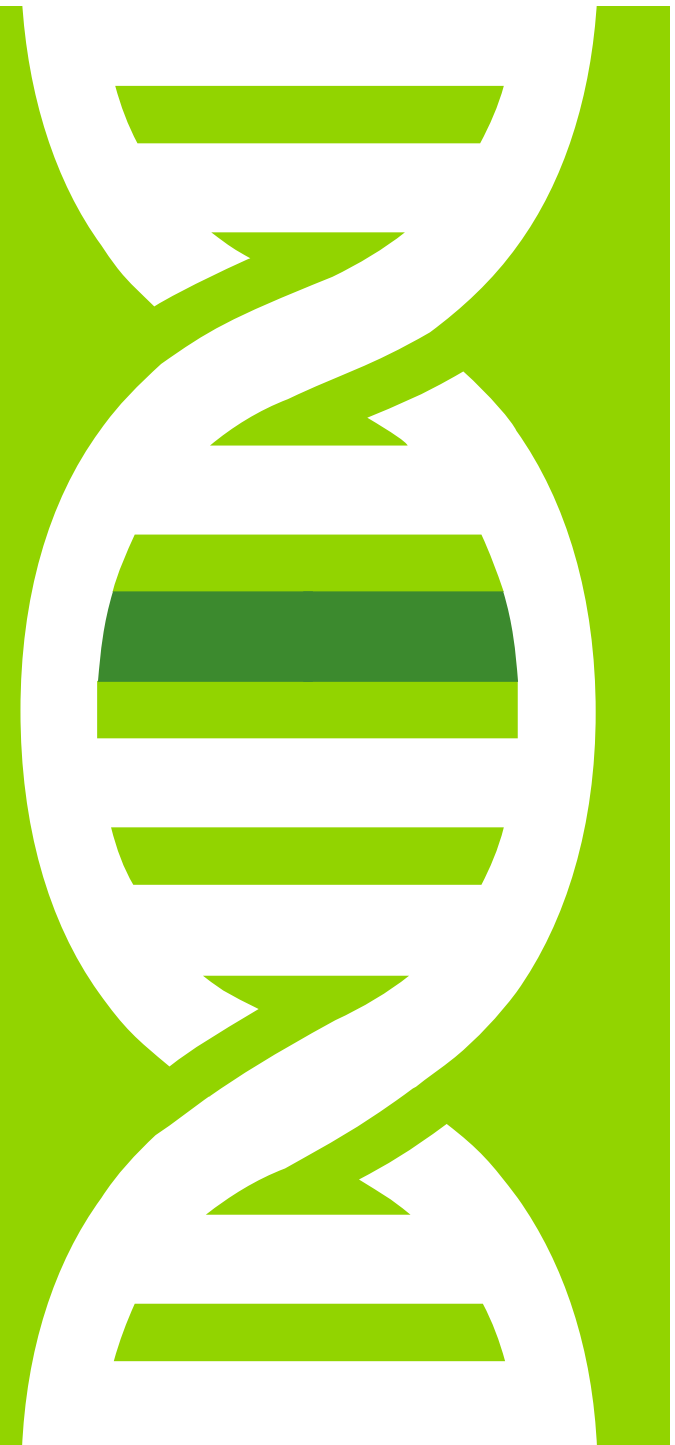
The government's talent model undergoes a radical transformation to create an **open, mobile, and dynamic workforce.**



GDP alone no longer **measures national prosperity**, indicators such as happiness and social progress become more prevalent.



This shift in the role of government combined with technological, societal, economic, and demographic forces **catalyze** an evolution in the operations and delivery of public services across education, healthcare, defense, law and justice, energy and environment, and human services.



Transportation

becomes as much about bits and bytes as it is about the physical infrastructure we walk, bike, drive, and ride on.



Sensor-powered dynamic pricing, mobile-enabled collaborative transport models like ridesharing, and social transport apps help tackle traffic congestion.



Advances in connected and automated vehicle technology leads to autonomous or semi-autonomous vehicles join the roadways.



Sustainable transport options like electric vehicles and e-bikes become widespread.



Air travel is reimaged through augmented reality-enabled self-service airports, while the skyways see greater drone use for civilian and commercial purposes.

Technological advances in **warfare and security** are creating new ways to defend national borders and its citizens.



Big data analytics takes center stage as intelligence and surveillance become key defense requirements.



Wearable sensors, smart uniforms, and performance-enhancing supplements significantly boost the capabilities of the next-generation warfighter.



Robot and drone armies strike with precision but complicate conventional laws that govern warfare.



The upsurge in cyber warfare makes it increasingly difficult to distinguish between terrorists, organized criminals, fringe movements, nation states, or teenage hackers.



Procurement sees a departure from historic norms with the rise of 3D-printed weapons and challenge-based R&D models.

Education

evolves to meet the needs of new talent demands and makes learning more accessible than ever before



A global shortage of highly skilled talent propels career-focused learning.



Virtual learning, digitization and augmented reality make obsolete our old definitions of a classroom.



Evolving learning needs redefine what education means, how it is delivered and by whom.



Students become teachers, learning from each other through project-based learning and self-organized learning environments.



Education funding shifts to pedagogical approaches proven to work via randomized control trials.



Unbundled, personalized, and dynamic education is the new normal in 2020.

Sustainability

continues to be a significant issue, but also a new opportunity for citizens, businesses and government alike.



Conversations on sustainability center on the three Cs — connect, collaborate, and coexist.



Smarter data and devices result in smarter energy choices, while networks of sensors, drones, citizen regulators, and conscious consumers work together to monitor and protect the environment.



Rapid urbanization fuels innovation and the quest for sustainable and resilient cities.



Market externalities become market opportunities as entire markets emerge around sustainable solutions such as reducing food waste.



Government regulation is less blunt — and heavily influenced by sensor-produced data.

Technology creates
new possibilities for
smart, customized,
and data-driven
human



Governments tap into community assets and peer-to-peer support programs to augment service delivery.



Behavioral psychology and economics play a larger role in designing successful interventions, while outcome-oriented social innovation financing helps scale the programs that work.



Mobile technology, sensors, and wearable devices enable remote monitoring. Virtual check-ins complement in-person interactions.



A new breed of caseworker-entrepreneur brings fresh ideas and innovation to human services organizations.



Outcome-based funding has finally moved beyond fringe status thanks to advances in measurement, data analytics and large inflows of private and nonprofit funding.

Law enforcement

move beyond the bars to more innovative ways of protecting public safety and delivering justice.



Mobile computing and electronic monitoring enable virtual incarceration.



Gamified web and mobile interfaces deliver jobs training, peer support connections and rehabilitation services.



Big-data analytics ensure that interventions are tailored to offenders' needs.



As crime becomes more high-tech, so does policing: drones act as eyes in the sky, while crime-prevention officers on the ground use wearable computing, facial-recognition and predictive video to fight crime.



Protecting against cyber and

In 2020 **health care** is not just important, it's everywhere.



Mobile health apps, telemedicine, remote monitoring, and ingestible sensors generate rich streams of data, allowing doctors and patients themselves to track every heartbeat, sneeze or symptom in real time.



Bioinformatics and analytics drive personalized risk-assessments and tailor-made medicine.



Breakthroughs in robotics, 3D printing and stem-cell research make surgical procedures safer and improve outcomes.



Health care systems shift their focus to wellness and prevention to compete against insurgent competitors.

2020 presents government, business, and citizens with new advancements, challenges, and most importantly — opportunities to progress towards a better, brighter, and more **sustainable** future.



Explore the website and share your thoughts on what you think our future holds: www.Gov2020.dupress.com

Contact globalpublicsector@deloitte.com for questions.

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a detailed description of DTTL and its member firms. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

Copyright © 2014 Deloitte Development LLC. All rights reserved.
Member of Deloitte Touche Tohmatsu Limited