

## **CHAPTER 5.2**

### **Cooperatives 2030: Some Factors Impacting the Future of Cooperatives and Business**

Study conducted by

**PROSPEKTIKER in collaboration with LKS, MONDRAGON, and  
The Millennium Project**

**2012**

#### **Executive Summary**

#### **1. Introduction and Methodology**

#### **2. The Questionnaire**

#### **3. Quantitative Responses**

#### **4. Analysis by Categories**

#### **5. Reasons and Comments**

#### **6. The Participants**

#### **Appendices**

Appendix A: Reasons Provided by Respondents

Appendix B: The Full Questionnaire and Backgrounder

#### **Table of Contents *2012 State of the Future***

## Executive Summary

Globalization via the Internet is changing business. Customers are increasingly becoming partners with producers of goods and services. Individuals are becoming international businesses with little effort. Non-profit businesses are being created by top business school graduates. New means of production via open-source software and hardware are being freely distributed to individuals for manufacturing via 3D printers and movie making and distribution via YouTube.

The United Nations designated 2012 as the International Year of Cooperatives. The intent is to raise awareness about the contributions of cooperative enterprises to economic and social development and to achieving the Millennium Development Goals.

In response, Prospektiker in collaboration with LKS, Mondragon, and The Millennium Project conducted a Real-Time Delphi study to explore the future of cooperatives and other business approaches. It identified key factors affecting the future of cooperatives as well as the probable future developments for these factors. An international panel of over 100 experts from 38 countries provided inputs.

The initial questions and statements of the RTD were based on an extensive review of existing research, reliable data sources, and tested assumptions. The participants were invited to answer questions about 59 developments, 11 variables, and 2 that were open-ended.

The panel concluded that the development of cooperatives can be a major generator of employment and development. Cooperatives fared well compared with other business models for improving the standard of living. Thus the cooperatives movement should be considered as a significant option for developing economies to help reduce the rich-poor gap.

Future developments that were rated as having the highest impacts (8 and higher on a scale of 1 to 10) on the future of both cooperatives and other business organizations<sup>1</sup> were globalization and future technological developments. For example:

- Main future sectors will be in the high-tech area (from space to agri-food) and will include nanotechnology, micro and nano electronics, biotechnology, photonics, new materials, and advanced manufacturing technologies. (11)
- In the case of technological development and investments in R&D, the establishment of partnerships and cooperation networks will increase. In addition to the financial advantages, synergies will be developed in various fields as a result of collaborative agreements between companies, universities, and research centers. (10)
- Globalization will continue, with the growth of exports and foreign direct investment greater than that of GDP. (1)

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<sup>1</sup> For space reasons, the statements of developments throughout this chapter have been shortened. Their respective numbers in the questionnaire are indicated in parentheses, and Appendix B lists the entire text of all items.

The results show that the geographic location has the lowest impact on all aspects considered in the study.

Figures 1 and 2 show high-impact developments on both cooperatives and other corporate organizations, while showing some differences. For example, the impacts on living standards were rated higher from cooperatives than from other business organizations.

Figure 1. Impacts of Developments on the Future of Cooperatives, other Business Organizations, and Improving Living Standards

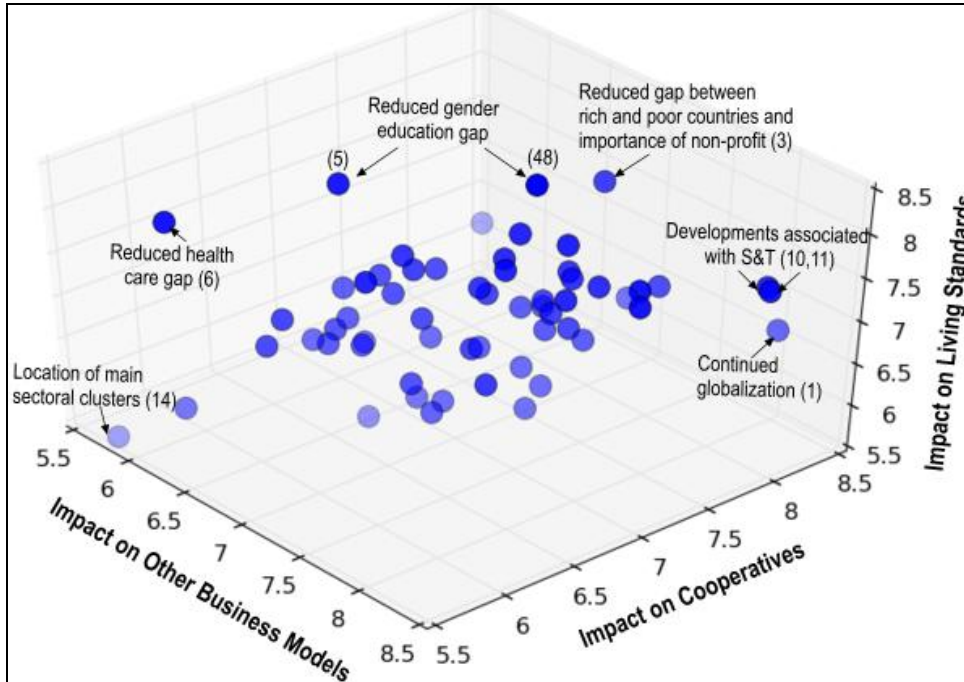
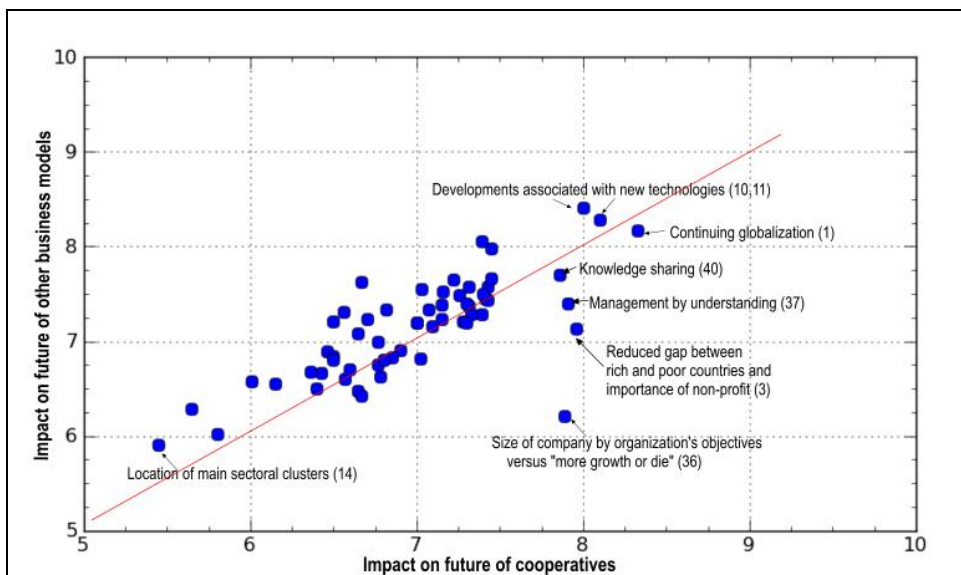
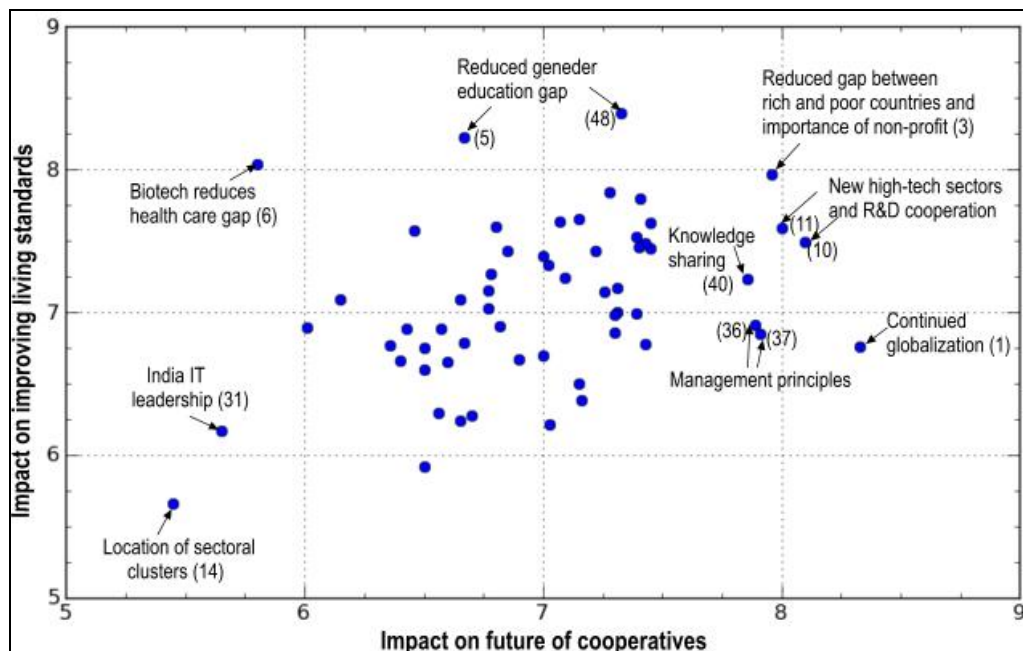


Figure 2. Impact of Developments on the Future of Cooperatives and Other Business Models



In particular, developments important to improving the standards of living—such as those related to partnerships, improved management, reduced rich-poor gap, and expansion of ethical markets—correlate better to the future of cooperatives than to that of other business organization models, as shown in Figure 3. For example, adjusting the size of the company to the organization’s objectives instead of seeking growth as an end in itself (36), and management by understanding versus by authority (37) were considered significant for cooperatives and for improving the standard of living, but with lower importance to the future of other business organizations.

Figure 3. Impact on the Future of Cooperatives and on Improving Living Standards



The developments judged having the highest probability of occurring by 2030 (75% and above) were:

- For 2030, globalisation of the job market will lead to the migration of workers to places with “talent attraction”, while other countries will experience a “brain drain”. (55)
- Recruitment of professionals will be carried out through social networks, a low-cost and good quality method that will also allow access to databases of professionals throughout the world. (56)
- The literacy gap between men and women will be reduced in developing countries, but with regional differences; the gap will be reduced by a larger degree in China, while in Africa, progress will be very slow. (5)

The developments judged having highest impacts (over 7.5 on a scale of 1 to 10) on improving the standard of living include:

- The literacy and education gap between men and women will be reduced. (48, 5)

- By 2030, the gap between rich and poor countries will be reduced for health (6) and economics, and the non-profit-making sector will become more important in both industrial and developing regions. (3)
- The concept of non-ownership will emerge, as distinct from private ownership or state ownership. (29)
- Biotechnology will be especially important in developing countries, helping to combat climate change, demographic imbalances, and the limitation of natural resources. (12)
- The economic valuation of a job continues to change to a more subjective perception of the post, with a demand for conditions that take diversity into account as well as measures that help to achieve a better balance in all aspects of life. (47)
- By 2030, the middle class in the BRIC countries will reach 2 billion (20) and that in Africa will reach 180 million. (23)
- Main future sectors will be in the high-tech area (from space to agri-food) and associated with future technologies: nanotechnology, micro and nano electronics, biotechnology, photonics, new materials, and advanced manufacturing technologies. (11)
- The mission of managers must be to maximize expectations for value in the long term, despite some short-term gain sacrifices. (25)

It is important to identify the correlation between the importance of developments to the future of cooperatives, or to improving the living standards, and their probability of occurring, so that developments that have an important positive impact can be encouraged, if possible. Similarly, increased importance should be given to the developments that were judged as having the highest potential for improving living standards but low probability of occurring by 2030. The graphs in Figure 4 and 5 show these correlations.

Figure 4. Probability of Occurring by 2030 and Potential Impact on the Future of Cooperatives

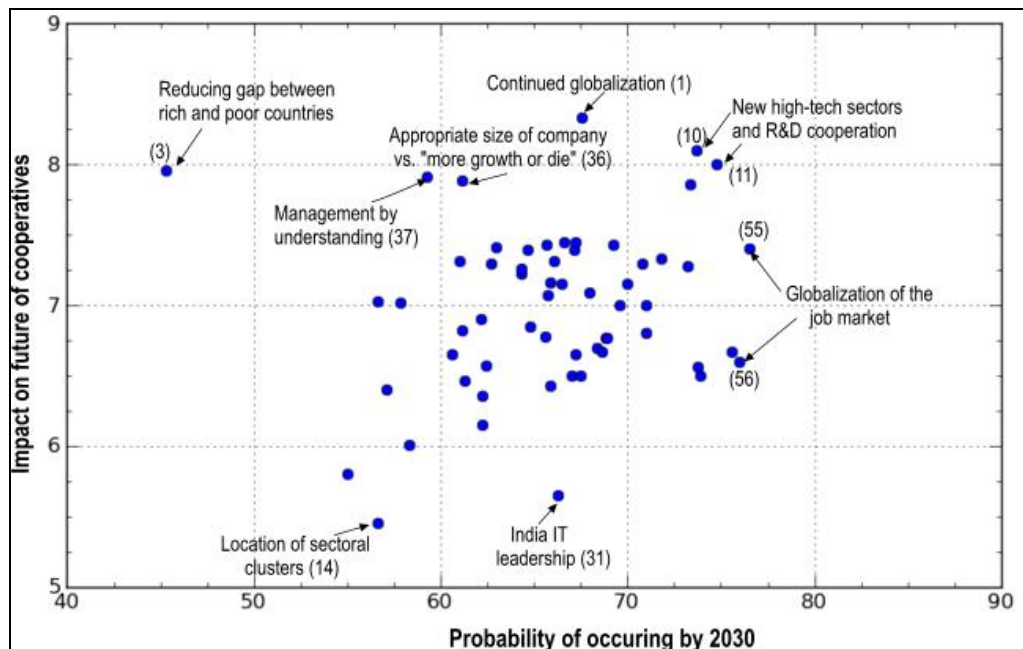
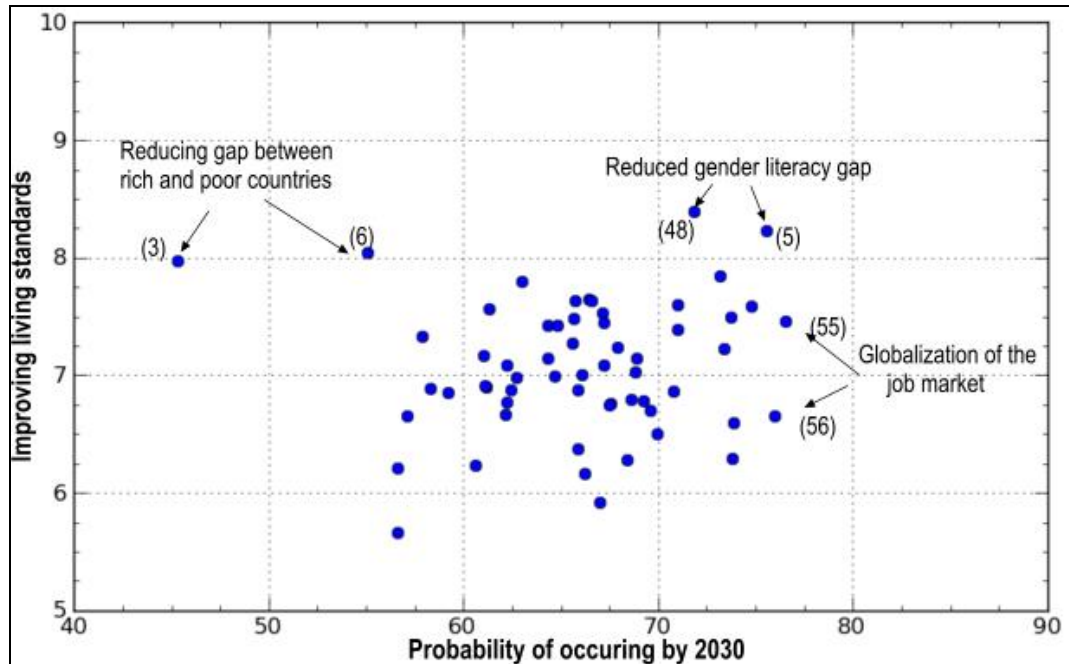


Figure 5. Impact on Improving Living Standards and Probability of Occurring by 2030



Following is a summary of the results by the categories in which the developments were grouped; see Chapter 4 for the full analysis.

### Environment and Markets

Continuous globalization (1) was the development judged as having the greatest combined impact on both cooperatives and other business models.

The development of partnerships and cooperation networks for technological development and investments in R&D (10), as well as the technologies themselves (11), will have important impacts on both business models as well as on the living standard. These were also rated as having a high probability of occurring by 2030.

In general, partnerships development and cooperation networks, as well as greater purchasing power of developing countries, are some of the variables with the greatest impact on cooperatives and on improving living standards.

### Company

The most important development for the future of cooperatives in this category was judged to be “management by understanding ... as distinct from management by objectives or authority, so that each employee has an understanding of the whole organization, making decisions in a fast changing environment.” (37) This also had a relatively highly rated impact on improving the standard of living but a low probability of occurring by 2030. The development was also considered of lower impact for other business modes. Similarly, the second highest-rated

development in this category assumes that the cooperative model will be more developed in areas of energy, health, mobility, and the financial sectors; these firms would pursue an “appropriate firm size” strategy instead of a “more growth or die” policy. (36)

The study found that the company of the future will need to establish a network system combining knowledge from diverse areas in an efficient and up-to-date manner, thus distributing the value and costs of innovation. (32) India is believed to maintain its global leadership in IT outsourcing. (31) However, some respondents felt that more countries should enter this field to increase competition.

Non-ownership, as distinct from private ownership or state ownership, will emerge (such as open-source software). (29) Increased financial participation of employees was considered helpful for improving organizations’ competitiveness and ensuring a sustainable future. (35) In this sense, effective participation of workers and worker-shareholders in the company is considered necessary. Changes in business models are likely as a result of more expensive and less abundant capital, due to higher interest rates caused by the distorted equilibrium between demand for capital and supply of savings. (27)

Consumption patterns will be also changing in the future, mainly due to a new middle class in emerging economies, increased sustainability awareness, and technological developments. (39)

### Labor Market

Interestingly enough, the developments of this category had the closest ratings for both business models. “Flexi-time” (46)—allowing work to start and finish at any time—was seen as about equally important to all business models. Globalization of the job market was rated in a similar fashion, with workers migrating to places with “talent attraction” while other countries will experience a “brain drain.” (55) These developments were also rated as having a relatively high impact on improving the living standard and a fairly high probability of occurring by 2030.

### Other Variables

The participants were invited to give estimates of the best and worst potential values for some variables, as well as their relative importance on business organizations of the future, with a focus on cooperatives.

The variable judged as having the highest relative importance was the total operations volume of the largest cooperative businesses at a global level. The estimates for 2030 were at best \$3.5 billion and at worst \$2.1 billion. For reference, the questionnaire gave the total global operations volume of the 300 largest cooperative businesses in 2008 as \$1.1 billion.

The participants were also invited to suggest additional developments and variables, as well as comments that might affect the future of cooperatives. Some of the new suggestions include:

- The political situation
- Climate changes by regions and unforeseen natural disasters in the coming period

- Security (even including the face of corruption and plutocracy, kleptocracy, autocracy, etc.)
- Corruption in cooperatives
- Coordination of internal organization with external environment
- Lack of social responsibility and government awareness of the importance of cooperatives as an organizational form of business association of interested people with the aim of achieving a better life

One of the comments was that security aspects were not addressed enough, while in the absence of acceptable levels of security, “‘business’ is challenged to [the point of being] impossible [to operate]” underlined a participant.



## 1. Introduction and Methodology

This study on Future of Business Organizations--Cooperatives and other Models was performed in the framework of 2012 being designated by the UN the International Year of Cooperatives. It aims to foster debate on the future of business organisations in general, and cooperatives in particular. It was designed to identify the key factors impacting the future of cooperatives by collecting a range of views on potential future scenarios and variables from an international expert panel.

The study used the Real-Time Delphi technique. The original Delphi methodology involves a series of questionnaires in which experts give their opinion about statements dealing, for example, with potential future developments. The judgments are aggregated and fed back to the participants in subsequent questionnaires seeking reasons for diverse opinions. The keys to a Delphi study are anonymity of the participants and feedback of group opinion. The Delphi method is used not only to forecast but also to help reduce uncertainty in order to contribute to improved decision-making.

Based on the original Delphi technique, the Real-Time Delphi is a more efficient method for collecting and synthesizing expert opinions. It is a “roundless” Delphi, in which the respondents participate online, by filling out a questionnaire, and the results—both numerical and qualitative—are updated as responses are recorded in “real time.” The participants may—and are encouraged to—revisit the questionnaire many times for as long as the study is open. Each time, they are shown their own prior responses as well as the updated average numerical answers and the qualitative narrative responses of the others. They can revise and change their own inputs.

The study was initiated by PROSPEKTIKER<sup>2</sup>, the MP Node in Spain<sup>3</sup> and developed in cooperation with LKS<sup>4</sup> and MONDRAGON Corporation.<sup>5</sup> Therefore, it was bilingual—English and Spanish. It was conducted between February 23 and April 15, 2012. The participation was by invitation to international experts in the field through The Millennium Project Nodes global network, as well as to relevant international actors related to the cooperative world or linked somehow to the International Cooperative Alliance (ICA) and government agencies.

The trend analysis performed by PROSPEKTIKER and its collaborators prior to the survey, revealed that major changes and shifts to the economy will continue in general, hence, affecting the business organisations in particular. The trend analyses also found that the developments relevant to the future of organisations and companies are numerous. Those considered the most important were included in the present RTD questionnaire, classified in the following areas:

- Environment and Markets (developments 1 to 24)
- The Company (developments 25 to 42)

<sup>2</sup> [www.prospektiker.es](http://www.prospektiker.es)

<sup>3</sup> [www.proyectomilenio.org](http://www.proyectomilenio.org)

<sup>4</sup> [www.lks.es](http://www.lks.es)

<sup>5</sup> [www.mondragon-corporation.com](http://www.mondragon-corporation.com)

- Labor Market (developments 43 to 59)
- Other Variables (variables 60 to 72)

For most of the developments, the team conducting the study formulated future assumptions (small scenarios) to 2020-2030, which formed the basis of the RTD questionnaire.

For formulating these assumptions, a thorough review of documents of existing research and studies into sources relative to developments and variables was performed. Only those scenarios that were supported by reliable and relevant studies and data were considered, thus avoiding untested assumptions. Some scenarios may seem somewhat limited, because reliability of sources prevailed over completeness of spectrum. Nevertheless, the participants were invited to enrich the statements with their own ratings and comments.

## 2. The Questionnaire

In all, the questionnaire had 72 questions (59 developments, 11 variables, and 2 open ended questions.) The respondents were invited to add to the list and comment on the statements listed. As mentioned before, the questionnaire was bilingual. The bilingual list of the questions together with all the background material and other explanations are available in Appendix B.

The list of developments and variables (English version) also appear in the next section, “Quantitative Responses” in a table along with their respective ratings.

Figure 6. A screenshot of the questionnaire

Please remember to press **SUBMIT** at end of questionnaire.

### Questionnaire

Questions	Probability and time of occurrence Probabilidad y horizonte de ocurrencia	Impact to the future of business organizations Impacto en el futuro de las organizaciones empresariales	Impact to the future of cooperatives Impacto en el futuro de las cooperativas
<p>1</p> <p>Globalization will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP. La globalización continuará, con un crecimiento de las exportaciones y de la Inversión Extranjera Directa (IED) mayor que el del PIB.</p> <p>(details)</p> <p><a href="#">Submit this page</a></p>	<p>75</p> <p>Probability of occurrence by 2030 (1 to 100) Probabilidad de ocurrencia antes de 2030(1 a 100) ( 67.6 ) ( 96 )</p> <p>1</p> <p>Importance to improving the standard of living (1=low; 10=high) Importancia para la mejora del nivel de vida (1=bajo; 10=alto) ( 11 ) ( 96 )</p> <p>8</p> <p>Your knowledge/expertise concerning this issue (1=none; 10=high) Su conocimiento y/o experiencia con el tema (0=ningunos; 10=experto) ( 6.7 ) ( 96 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>	<p>8</p> <p>How large will be the impact for enterprises? (1 to 10; 10=huge) ¿Cómo de grande será el impacto para las empresas? (1 a 10; 10=enorme)</p> <p>Changes are OK Average= 8.2 (95 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>	<p>3</p> <p>How large will be the impact for cooperatives? (1 to 10; 10=huge) ¿Cómo de grande será el impacto para las cooperativas? (1 a 10; 10=enorme)</p> <p>Changes are OK Average= 8.3 (95 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>
<p>2</p> <p>New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc. Se desarrollarán nuevas definiciones del PIB que incluyan todo tipo de aspectos del bienestar nacional: energía, materiales, ecosistemas, capital social y humano, etc.</p> <p>(details)</p> <p><a href="#">Submit this page</a></p>	<p>99</p> <p>Probability of occurrence by 2030 (1 to 100) Probabilidad de ocurrencia antes de 2030(1 a 100) ( 67.2 ) ( 99 )</p> <p>9</p> <p>Importance to improving the standard of living (1=low; 10=high) Importancia para la mejora del nivel de vida (1=bajo; 10=alto) ( 14 ) ( 99 )</p> <p>9</p> <p>Your knowledge/expertise concerning this issue (1=none; 10=high) Su conocimiento y/o experiencia con el tema (0=ningunos; 10=experto) ( 7.3 ) ( 99 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>	<p>9</p> <p>How large will be the impact for enterprises? (1 to 10; 10=huge) ¿Cómo de grande será el impacto para las empresas? (1 a 10; 10=enorme)</p> <p>Changes are OK Average= 6.5 (96 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>	<p>9</p> <p>How large will be the impact for cooperatives? (1 to 10; 10=huge) ¿Cómo de grande será el impacto para las cooperativas? (1 a 10; 10=enorme)</p> <p>Changes are OK Average= 6.7 (95 )</p> <p>Reasons for your answer Explicación de su respuesta <a href="#">click here; hacer click aqui</a></p>

For each development, there were asked three sets of questions:

Probability and time of occurrence

- Probability of occurrence by 2030 (1 to 100)
- Importance to improving the standard of living (1=low; 10=high)
- Your knowledge/expertise concerning this issue (1=none; 10=high)

Reasons for your answer

Impact to the future of business organizations

- How large will be the impact for enterprises? (1 to 10; 10=huge)

Reasons for your answer

Impact to the future of cooperatives

- How large will be the impact for cooperatives? (1 to 10; 10=huge)

Reasons for your answer

At the end of the questionnaire, the participants were invited to add additional suggestions and/or comments.

### 3. Quantitative Responses

The following table lists the statements with their respective ratings.

No	Statement	Probability of occurring by 2030 (1 to 100)	Importance to improving standard of living (1=low, 10=high)	Future impact on other business	Future impact on coops.
1	Globalisation will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP.	67.55	6.76	8.17	8.33
2	New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc.	67.19	7.09	6.47	6.65
3	By 2030, the gap between rich and poor countries will be reduced and in the latter case it will especially important for helping to reduce poverty. The non-profit-making sector will become more important in both, developed and developing regions.	45.30	7.97	7.13	7.96
4	In 2030, there will continue to be large differences between rich and poor countries in their capacity to innovate, as the latter will not have the necessary financial resources and personnel.	65.59	7.27	6.63	6.78
5	The gap in the level of literacy between men and women will be reduced in developing countries, but with regional differences; the gap will be reduced by a larger degree in China, while in Africa, progress will be very slow.	75.57	8.23	6.43	6.67
6	By 2030, the gap existing between rich and poor countries as regards health care will be reduced thanks to advances in the biotechnology sector.	55.04	8.04	6.02	5.80
7	Higher intensity in the level of protectionism is expected on trade and investments at a global level.	56.63	6.21	7.55	7.03
8	In the case of the US, for example, the perception of inequality in the benefits of globalisation could intensify protectionism.	60.61	6.24	7.08	6.65
9	In order to ensure that public-private collaboration continues to play its role over the long term, the European Commission will establish an effective cooperation and training framework to cover the public and private sector.	64.68	6.99	7.28	7.39
10	In the case of technological development and investments in R&D, the establishment of partnerships and cooperation networks will increase. In addition to the financial advantages, synergies will be developed in various fields as a result of collaborative agreements between companies, universities and research centers.	73.71	7.49	8.29	8.10
11	Main future sectors: the aerospace industry, health and safety, environment and climate change, energy, industries linked to sustainable mobility and other industries linked to chemistry, engineering, transport, and agri-food. As regards sectors associated with future technologies: nanotechnology, micro and nano electronics, biotechnology, photonics, new materials and advanced manufacturing technologies.	74.75	7.59	8.41	8.00
12	By 2030, biotechnology will be especially important in developing countries, as regards agriculture (green biotechnology) and industry (white biotechnology), in order to combat climate change, demographic evolution and the limitation of natural resources.	66.46	7.65	7.23	7.15
13	Banking sector: The banks of emerging countries will catch up with those of the G-7 in 2036 and in 2050 they will be 50% larger. Chinese banks will catch up with those of the US in 2023 and in 2030 its assets will be worth 4 billion dollars more than American banks. India will overtake Japan in 2033.	68.37	6.28	7.24	6.70

No	Statement	Probability of occurring by 2030 (1 to 100)	Importance to improving standrd of living (1=low; 10=high)	Future impact on other business	Future impact on coops.
14	In 2040, the main sectoral Clusters will be the following and located in: - Asset management: London, New York, Singapore - Pharmaceutical Industry: London, New York, Singapore - Automotive assembly: Sao Paulo, Nanjing (China), Tianjin (China) - University education: New York, Boston, London - Cinema and entertainment: Los Angeles, Mumbai, Shanghai	56.63	5.66	5.91	5.45
15	Those countries with the greatest demographic and per capita income growth will be considered as the most attractive geographical markets.	69.97	6.50	7.38	7.15
16	Real GDP will grow 4 times more quickly in developing countries than in developed countries, reaching annual growths of 6.7%.	64.34	7.43	7.65	7.22
17	China's GDP will exceed that of the United States to become the biggest economy in the world in 2026.	73.78	6.29	7.31	6.56
18	The BRIC countries will continue to be the most interesting markets for Direct Foreign Investment in 2030. By 2030, the share of exports of the BRIC countries compared with world exports will be on a par with the European (EU 27) export share, of approximately 23%.	68.63	6.79	7.63	6.67
19	Exports from India will grow by 13% per year until 2030, followed by China (7.1%), Brazil (6.5%) and Russia (4.9%).	73.90	6.60	7.21	6.50
20	Increase in purchasing power: The middle class in BRIC countries will grow by 150% from 800 million currently to 2000 million by 2030.	66.59	7.63	7.98	7.45
21	"Next Eleven" Countries: Bangladesh, Egypt, Indonesia, Iran, Mexico, Nigeria, Pakistan, Philippines, South Korea, Turkey and Vietnam. Their real GDP will grow by 5.9% annually over the next 20 years, reaching 30% of the total GDP of the BRIC countries and 11% of world GDP.	61.14	6.90	7.34	6.82
22	South Africa, Nigeria, Egypt and Angola will be the African countries with the highest growth. Africa will increase its world exports from the current 2.8% to 7.1% by 2030.	58.31	6.89	6.58	6.01
23	Africa's middle class will grow strongly to 2030, increasing by more than 110 million in the next 20 years, from the current 55 million to 180 million in 2030 (5% of the world's middle class).	61.28	7.57	6.89	6.46
24	Without counting Brazil, Argentina will be the largest economy in South America in 2030, reaching a fifth of Brazil's GDP. The countries with the next highest growth in GDP will be Columbia, Chile and Venezuela. Global exports from South America will go from the current 5.6% to 6.3% in 2030.	65.85	6.88	6.66	6.43
25	Extra-financial factors: brands, technology, capacity for innovation, information systems, customer relationships, business culture values, image or reputation will, like intellectual capital, contribute to the strengthening of companies and to the fundamental improvement of capabilities and competencies in the medium to long term. Consequently, it can be seen that the mission of managers must be to maximise expectations for value in the long-term, despite some short-term gain sacrifices.	67.15	7.53	8.05	7.39
26	According to Forrester consultancy group, the mass customisation of the future will be more social, physical (technologies such as Microsoft XBOX Kinect, etc.), mobile, intimate (even more customised), integrated (greater change of products), based on platforms (shared technologies) and co-created (using customisation to create more significant solutions and standard products). These products will lead to unprecedented customer loyalty levels and will generate a strong product market differentiation.	65.85	6.38	7.53	7.16

No	Statement	Probability of occurring by 2030 (1 to 100)	Importance to improving standard of living (1=low; 10=high)	Future impact on other business	Future impact on coops.
27	For 2020, global investment demand could reach maximum levels and consequently, the difference between capital demand and savings will probably increase real interest rates in the long term. For this reason, companies, financial institutions, consumers, investors and governments will have to adapt to a world in which capital is more expensive and less abundant, and where more than half of savings and investment is concentrated on emerging markets. This means that business models should evolve, investors should develop new strategies and governments could play a significant role in facilitating this transition.	66.05	7.00	7.58	7.31
28	In the 2020s economic system, productive entrepreneurship will be acknowledged and supported. It will be encouraged by a policy of stricter competition that will better serve growth through innovation rather than by mergers and acquisitions. Institutional structures will be established to provide long-term finance for companies that enter new areas such as those of the low carbon economy, to improve the use of existing technologies or transform cultural and creative value into new commercially exploitable products and services, including investments in brand value.	61.02	7.17	7.37	7.31
29	The concept of non-ownership will emerge, as distinct from private ownership or state ownership. An example of this is open source software.	62.96	7.80	7.45	7.41
30	Self employment via Internet - individuals seek markets for their abilities rather than jobs. New simpler methods will be developed so that individuals can invest directly in start-up companies and in research.	68.80	7.03	6.99	6.77
31	India will continue to maintain its world leadership in Information Technology Business Process Outsourcing (IT-BPO), the Indian market increasing from 71,600 million dollars in 2009 to 285,000 millions of dollars in 2020, with an annual growth of 15% approximately.	66.24	6.17	6.29	5.65
32	Another option will be to outsource innovation to other network business partners, thus distributing the value of the innovation along the value chain, thus reducing the cost to the companies.	66.98	5.92	6.84	6.50
33	Thus, it is predicted that in 2020 polarisation between large multinationals and small business projects developed over a network will take place:	69.26	6.78	7.57	7.43
34	In the case of the banks, after the financial crisis, the increased focus on international governance, the stress test analysis of scenarios, liquidity and capital adequacy, should result in the value of governance functions, risks and compliance being more apparent.	62.24	7.09	6.55	6.15
35	With a view to the "Europe 2020" strategy, the introduction of employee financial participation may help companies in Europe, in particular SMEs, to improve their competitiveness as it increases identification with them and links with their qualified workers - both in good and bad times. Thus, the employees' financial participation can also contribute to ensuring a sustainable future.	62.24	6.77	6.68	6.36
36	According to the "Al(l)one" Scenario of the report "Worker Participation 2030. Four scenarios", the 2020 decade will see a development in the concept of cooperatives as organisations made up of various groups to achieve their specific common objectives, in fields such as energy, health, mobility and the financial sector for supporting local projects. In this context, to seek the size of company appropriate to the organisation's objectives instead of growth as an end in itself, it will limit the risk of losing direction and entering a spiral of "more growth or die".	61.12	6.91	6.21	7.89
37	Management by understanding is developed as distinct from by objectives or authority, so that each employee has an understanding of the whole organisation, making decisions in a fast changing environment.	59.24	6.85	7.40	7.91

No	Statement	Probability of occurring by 2030 (1 to 100)	Importance to improving standard of living (1=low; 10=high)	Future impact on other business	Future impact on coops.
38	According to the "Global Interest" Scenario for 2018, an effective globalised response to global challenges leads to an increase in resource productivity and low carbon growth. Successful companies have integrated sustainability management throughout the organisation. Corporate Social Responsibility (CSR) departments belong to the past.	57.87	7.33	6.82	7.02
39	The rise of a new middle class in emerging economies will lead to unprecedented shifts in the consumer of 2020, such as relatively small and discounted purchases. Climate change, sustainability and the purchase of healthy products of natural origin will increasingly become topics of interest for consumers all over the world. As regards developments in technology, the implications of the method of attracting consumers to adopt or purchase products will be increasingly clear, in view of the increased information to which they have access.	67.93	7.24	7.16	7.09
40	As global knowledge connectivity and generation increases, companies need to establish a system that combines knowledge from different areas in an efficient, up-to-date network. Openness to the knowledge of others, knowledge sharing and common knowledge creation will become key targets for enterprises. For this, social networks, semantic web technologies and open innovations will play an important role, Web 2.0 will advance to Web 3.0.	73.38	7.23	7.70	7.86
41	According to the "Factories of the Future" initiative, the focus of European industrial production to 2020 will be intelligent sustainable production, based on high performance ICTs based on the use of new materials.	67.23	7.45	7.66	7.45
42	According to the report "The Future of Corporate Innovation", the centralised R&D models will be replaced by open innovation structures. The vision for the Innovation Network: Simple, transparent, instantaneous and with global access to globally distributed R&D resources and services.	64.30	7.14	7.49	7.26
43	By 2030, the economically active population will have grown by 21% compared to 2010. Developing countries will grow by 931 million workers, equivalent to 24%. However, in developed countries it will be reduced by one million, mainly due to the ageing of their societies.	68.91	7.15	6.75	6.77
44	Occupations requiring highly and poorly skilled workers in the job market will increase in terms of jobs and salaries but the number of semi-skilled workers will decrease, leaving rich countries with an hourglass economy.	62.41	6.88	6.60	6.57
45	Employment growth will be mainly in the areas: financial services, health care workers for older people, fight against climate change and infrastructure in the BRIC countries.	62.17	6.67	6.91	6.90
46	In the spirit of conciliation, the concept of "Flexi-time" will be extended into the future, so that work may start and finish at any time.	65.64	7.48	7.44	7.43
47	The economic valuation of a job continues to change to a more subjective perception of the post, with a demand for conditions that take diversity into account as well as measures that help to achieve a better balance in all aspects of life.	65.74	7.64	7.33	7.07
48	In two decades time there will be more equality between men and women. The differences between men and women as regards primary education will be nearly non-existent by 2030. As of secondary education, the difference will decrease considerably, to 48% of men and 40% of women.	71.80	8.40	7.28	7.33
49	The demographic drop in developed countries, the greater percentage of highly skilled women and the growth of the knowledge society will mean that organisations will attempt to attract a greater number of professional women.	73.19	7.84	7.21	7.28



No	Statement	Probability of occurring by 2030 (1 to 100)	Importance to improving standard of living (1=low; 10=high)	Future impact on other business	Future impact on coops.
50	There are 240 million migrant workers in the world. It will be important, therefore, to maintain open borders to encourage the movement of qualified workers, and agreements will be defined to facilitate immigration, for example, through the creation of a code that regulates migrant flows at a global level. Furthermore, intercultural management within organisations will be another challenge that will enrich their knowledge and will acquire particular relevance in the interrelationships and/or conflicts between workers with other cultures and societies different to those of the country of origin, and it will go beyond the vision of a work approach from the perspective of a single culture to a multicultural vision as demanded by a increasingly competitive market.	64.79	7.43	6.83	6.85
51	New generations such as the generation M (the Multimedia, Messenger, MySpace, Multitask, etc. generation), will create a new pace and new ways to perform in the work environment (multitasks, interactivity, new values, etc.), and it will be necessary to work on incentives to use the new technologies and networks at all levels, reducing the existing gap, especially with older workers. On the other hand, the aging of the active population in many of the most developed societies and the lack of a generational replacement leads to a scenario that we must address from the present with policies and programmes aimed at flexibility in work, continuous learning, transmission of knowledge and to non discrimination due to age in the job market (in the European Union, 64% of those surveyed thought that the economic crises would bring with it an increase in age discrimination in the job market).	71.00	7.39	7.20	7.00
52	Today, globally, life expectancy at birth is 68, which is expected to rise to 81 by 2100. Around 20% of the world's population will be over 60 in 2050, around 20% of Europeans are 60 or over compared with 10% in Asia and Latin America and 15% in Africa. More than 20 countries have decreasing populations which could increase to 44 in 2050, the majority of these in Europe. People will have a longer life and there will be more opportunities for telework, part time work and work rotation to reduce the economic load on the younger generations and to maintain standards of living.	71.00	7.60	6.80	6.80
53	Companies will increasingly adopt a total compensation flexible scheme, like an "a la cart" menu, where the employees will have a mandatory basic benefits part and complete freedom to select, integrate and finance a flexible package of benefits that will respond very specifically to their needs and aspirations.	62.70	6.98	7.20	7.30
54	Organisations will develop strategies to attract talent focussed at a global level, beyond local and national borders. With the aim of attracting the best professionals, organisations will intensify their cooperation with universities. Furthermore, talent retention strategies will become key aspects for companies and organisations, with the aim of strengthening the workforce and work teams.	70.80	6.86	7.40	7.30
55	For 2030, globalisation of the job market will lead to the migration of workers to places and countries with attractive job markets and societies with a good quality of life where "talent attraction" will be seen, while other countries will experience a "brain drain".	76.50	7.46	7.50	7.40
56	Furthermore, recruitment of professionals will be carried out through social networks, a low-cost and good quality method that will also allow access to databases of professionals throughout the world.	76.00	6.65	6.70	6.60
57	The lack of talent will intensify both in developing and developed countries on the 2030 horizon; in developed countries the reason will be due to a reduction in the supply of professionals, while in developing countries it will be due to the increase in demand for professionals.	69.60	6.70	7.20	7.00
58	Developed economies will lose an average 20,000 million Euros per country due to the lack of qualified professionals.	57.10	6.66	6.50	6.40
59	In developing countries, the population of working age will continue to grow, but in the countries with a strong GDP (e.g. China), the demand for employees will greatly outstrip the supply (while other developing countries could face high levels of unemployment).	67.50	6.75	6.80	6.50

The variables asked what the best and worst plausible values might be by 2030 for each variable and the importance of the variable to the business community in general and to cooperatives specifically. The average results are presented in the following table.

Quest. no.	Variable	What is the best plausible value within the next two decades?	What is the worst plausible value within the next two decades?	What is the relative importance of this variable? (1= max impact)
60	There are co-operatives in all the world's countries, and it is estimated that 1000 million people are members of cooperatives.	1100 million	227.5 million	5.2
61	The 300 largest cooperative businesses at a global level in 2008 had a total operations volume of 1.1 billion dollars.	\$3.5 billion	\$2.1 billion	5.4
62	The majority of the 300 largest cooperatives in the world are in the developed economies of Germany, the United States, France, Japan, and the Low Countries. [number of large cooperatives in these countries in 2030]	321.6	158.5	4.5
63	Distribution by sectors of these 300 cooperatives is as follows: 30% in agriculture and food; 23% in the retail trade; 22% in insurance; and 19% in the banking sector.	See "Reasons and Comments" section		4.6
64	In the US, more than 900 electrical supply cooperatives provide services to more than 42 million people in 47 states. This represents 42% of the electrical distribution lines and covers 75% of the country's territory.	470.1	147.9	4.4
65	In Europe, the agricultural cooperatives have a total market share of approximately 60%, as regards production and marketing of basic agricultural products and an estimated 50% in the supply of inputs.	110.6	24.6	5.0
66	In New Zealand, the co-operatives control all the stages in the agricultural distribution and production chain, and market share is greater than 75%, while market share for consumer cooperatives that they occupy in the distribution of retail foods is 60%.	74.2	34.7	5.1
67	In Brazil, cooperatives accounted for 37.2% of agricultural GDP and 5.4% of total GDP in 2009. [% of agricultural GDP in 2030:]	50.4	19.8	5.0
68	In 2009, the 8124 cooperatives in Columbia accounted for 4.96% of national GDP. [% of national GDP in 2030:]	5.3	1.26 <sup>6</sup>	4.8
69	In Kenya, the savings and loans cooperatives, the biggest in Africa, have assets of 2700 million dollars, which represents 31% of gross national savings. [% of gross national savings in 2030]	49.46 <sup>7</sup>	10.8	4.6
70	In Mauritius, the agricultural sector cooperatives represent more than 60% of national production in the food crop sector.	70.2	29.2	5.4

<sup>6</sup> In this case, the best and worst values were reversed

<sup>7</sup> Original data corrected for percentage

## 4. Analysis by Categories

Following is a detailed analysis made by the team of PROSPEKTIKER<sup>8</sup>, the MP Node in Spain<sup>9</sup>, which initiated the study. It developed the study in cooperation with LKS<sup>10</sup> and MONDRAGON<sup>11</sup> Corporation.<sup>12</sup>

### ENVIRONMENT AND MARKETS

As shown in the results, **movements and shifts** currently taking place or expected to take place in the coming years and decades with respect to **globalisation, growth of emerging countries and consequent increase in global competition**, will have a significant impact on the future of business organisations. In this regard, although the above phenomena may have a different impact on the future of cooperatives, it will still be significant.

The answers collected show that in the next two decades, the **main sectors in which development is greatest** are those related to the aerospace industry, health and safety, environment and climate change, energy, sustainable mobility and transport, and other industries related to chemistry, engineering and the agri-food industry. Also included are the fields of education, culture, sports and entertainment.

Furthermore, sectors **using future technologies** include nanotechnology, micro and nano-electronics, biotechnology, photonics, new materials and advanced manufacturing technologies. Thus, the likelihood of this scenario actually happening in the coming years is 80% according to the experts who participated in the study. Also included are **ICT industries and services that support other industries and sectors**. In this regard, special emphasis is given to new, currently non-existing developments in technology, which will be available in the coming years. In fact, many of the products and services that will be available in 2030 are not yet created. This, of course, poses a major challenge for companies.

The analysis shows that the **evolution of the main sectors of the future** described above, of which the outcome is highly likely to occur according to experts, will have a significant impact on business organisations as a whole. This variable reaches a score of 8.41 on a scale of 10, the highest score of the variables identified in this area. Next, the **formation of partnerships and cooperation networks for technological development and investments in R&D** is also considered to have a major impact on these organisations (8.29 out of 10), as well as the **continuation of globalisation and growth of exports and foreign direct investment** (8.17 out of 10).

<sup>8</sup> [www.prospektiker.es](http://www.prospektiker.es)

<sup>9</sup> [www.proyecomilenio.org](http://www.proyecomilenio.org)

<sup>10</sup> [www.lks.es](http://www.lks.es)

<sup>11</sup> [www.mondragon-corporation.com](http://www.mondragon-corporation.com)

<sup>12</sup> For further information, please contact Ibon Zugasti, Chair of the Millennium Project Node in Spain at [i.zugasti@prospektiker.es](mailto:i.zugasti@prospektiker.es).

Regarding the differential impact on cooperatives, the following stand out in particular: **setting up an effective and booster framework for cooperation between the public and private sector**, the **development of biotechnology in agriculture in developing countries**, and the **existing gap between rich and poor and the role of the non-profit sector**.

Furthermore, and of special relevance to cooperatives, these variables are precisely those that contribute most to improving the quality of life of people compared with the variables related to other business organisations. Apart from the above, the formation of partnerships and cooperation networks and greater purchasing power of developing countries, as shown in the following comparative table, are some of the variables with the greatest impact on cooperatives and on improving the quality of life.

<b>IMPACT ON IMPROVING QUALITY OF LIFE</b>	<b>IMPACT ON COOPERATIVES</b>	<b>IMPACT ON BUSINESS ORGANISATIONS</b>
Gap between rich and poor countries and the role of the non-profit sector	Formation of partnerships and cooperation networks	Evolution of the main sectors of the future
Reduction of the gap between rich and poor in terms of health care	Evolution of the main sectors of the future	Formation of partnerships and cooperation networks
Gap in literacy levels between men and women in developing countries	Globalisation and the growth of exports and foreign direct investment	Globalisation and the growth of exports and foreign direct investment
Differences in innovation potential between rich and poor	Increased purchasing power	Increased purchasing power
Growth in GDP and world exports of South American countries	Establishing an effective and booster framework between the public and private sector	Fast GDP growth of developing countries
Development of biotechnology in developing countries in agriculture and industry	Fast GDP growth of developing countries	Growth of BRIC countries
Evolution of the main sectors of the future	Attraction of countries with higher population growth and per capita income	Greater level of protectionism
Establishing an effective and booster framework between the public and private sector	Development of biotechnology in developing countries in agriculture and industry	Attraction of countries with higher population growth and per capita income
Increased purchasing power	Gap between rich and poor countries and the role of the non-profit sector	GDP growth of "Next Eleven" countries
New definitions of GDP	Greater level of protectionism	China's GDP growth

## COMPANY

According to the consulted experts, and with a probability of occurrence of 81%, **the company of the future will need to establish a networked system combining knowledge** from several and diverse areas in an efficient and up to date manner. Thus, being open to knowledge from others, sharing knowledge and creating common knowledge will become priorities. Also, this group of experts believes that **India will maintain its global leadership in the outsourcing of Information Technology**. This scenario happening has a probability of occurrence of 79%. However, according to some, more countries must be included due to increasing competition.

The **financial participation of employees** will help organisations improve their competitiveness, and ensure a sustainable future. In this sense, besides a financial link, an effective participation of workers and worker-shareholders in the company is considered necessary. Also important are **major changes in the consumer of the future**, mainly because of a new middle class in emerging economies, a heightened sustainability awareness and technological development. Another fundamental variable concerns the **changes in business models as a result of more expensive and less abundant capital**, directly related to the higher interest rates caused by the distorted equilibrium between demand for capital and supply of savings. Finally, the **importance of extra-financial factors** must be highlighted and leading from that cashing in on value expectations in the medium and long term.

The company environment also establishes a clear differential impact on cooperatives compared to other business organisations. The participants in the study considered the variable relative to the **development of comprehension management as opposed to management by objectives or authoritarian approach**, as the variable with the greatest impact on cooperatives. Also noteworthy is the variable with a differential impact on cooperatives claiming that the cooperative model will be more developed in areas of energy, health, mobility and the financial sector, which besides pursues an "appropriate firm size" instead of a "grow-or-die" policy.

In terms of contribution to improving the quality of life of people, the variables clearly linked to cooperatives stand out again because of their greater contribution, such as a **greater development of the cooperative model** in areas of energy, health, mobility and the financial sector or **financial participation of the employee**.

## LABOUR MARKET

According to the feedback from the Delphi questionnaire, the coming 20 years, the most likely scenario is that **recruitment of professionals will take place through social networks** with a lower cost and high quality. According to the participants, the probability that this happens stands at 85%. Also, according to this same group, it is highly likely (with 81%) that **the globalisation of the labour market will lead to a migration of workers to places with**

**attractive labour markets**, resulting from the phenomenon "attracting talent" by some countries, while others will face the problem of a "brain drain".

Also, the impact on the future of organisations of this last variable of labour market globalisation will be major. It is followed closely with the same rating of 7.44 points by a variable closely related to this topic, namely the development of globally focused strategies to attract talent, in addition to the variable that includes the concept of "flexi-time" relative to reconciling work and family life.

Regarding the differentiating factor in cooperatives, variables with the greatest impact on cooperatives (**family reconciliation and the "flexi-time" concept, worker migration as a result of globalisation of the labour market or the reduction of inequalities between men and women in education**) are those that contribute most to a better quality of life for people in general, as in the other studied areas.

### OTHER VARIABLES

Finally, this fourth section analyses the main ideas of other developments that could affect the progress of business organisations of the future, considering the **impact on cooperatives**, as well as on **other variables which must be considered when determining trends for cooperatives**.

On a whole, developments with a focus on ethics and values "because of the greater impact on cooperative organisations are identified directly. These values "relate to **democratic management and equal rights, social responsibility and commitment to sustainability, solidarity values "and fair trade**. It is also considered that the development of the cooperatives themselves can be a major boost to employment and development, mainly in less developed countries; thus, cooperativism is considered as a significantly growing future option in emerging countries.

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### **Acknowledgement**

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## 5. Reasons and Comments

Respondents were asked to provide reasons for their answers where they wished, to read the answers provided by others, and comment as they considered appropriate. Appendix A provides a complete verbatim listing of the reasons and comments given; a few examples are quoted below. These examples have been slightly edited and include only those provided in English; check Appendix A for the original statements, including the Spanish ones. In this section, an effort was made to limit the number of examples presented to only a few per question.

### **Question 1. Globalisation will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP.**

The exponential expansion of the availability of global information and communication at decreasing cost will insure globalization will continue. Home country bias in investment will continually decline.

Unemployment will be the only possible break on globalization; cure unemployment and globalization will accelerate

There seems to be a bifurcation, or maybe a segmentation of society into two groups, and it will take a long time, perhaps several generations for that to iron itself out. I happen to think that the situation is far more fragile and complex than any current political system has the capability to handle. Think Ashby's Requisite Variety: there are far more degrees of freedom in play than the gross oversimplifications and reductions will support.

Globalization will continue and grow.exports from the USA will grow...but direct foreign investment will not be greater than GDP

Globalisation will continue because the added value for international business organisations is high to use the differences among countries situation in the world to increase their profit and strengthen their situation in the global competition. This restructuring of the world economy could create great instability and crisis in numerous countries until a new stabilisation would emerge. The new situation could greatly increase the world situation as a whole provided that this huge change could be kept under tight political control at world level to soften the negative consequences of the transition.

### **Question 2. New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc.**

Governments are too slow to incorporate new measurements and common standards regarding energy, taxes, and in general common economic measurements.

I believe a need for a broader definition of GDP will be recognized in future years, since the present one doesn't give the whole picture.

My view is that this is already happening. Ongoing crises with current economic rationality and system will begin to valorise and eventually catalyse this shift.

If the new definitions of GDP are changed to include measures of happiness, the organizations may have to offer new products and profit may not be so important any more. But of course no matter what the definition, they have to support themselves.

**Question 3. By 2030, the gap between rich and poor countries will be reduced and in the latter case it will especially important for helping to reduce poverty. The non-profit-making sector will become more important in both, developed and developing regions.**

This question should be divided into two. One problem is "gap between rich and poor countries will be reduced" - I am not sure about it. On the other hand I believe "the non-profit-making sector will become more important".

This addresses two questions, but I have taken the liberty of assuming that the gap referred to here is purely in terms of economic/ financial wealth and the role of non-profit organizations in narrowing that gap. In terms of that I see a narrowing of the gap between rich and poor countries and also an increase in role of non-profit organizations.

According to the present global situation, I haven't observed diminishing the gap between rich and poor countries. Only intense, complex, systematic efforts in many areas, including economic and social ones, could lead to an improvement of that issue.

This could happen if a few more governments of emerging economies take the plunge and persist in rooting out corruption in government and in criminal commerce (principally illegal drug trade and black market commerce. A more certain political and economic policy environment encourages FDI which is necessary to balance productivity levels between lesser and more advanced economies. Though there is role for non-profit sector in this transition process, as the rebalancing occurs, there is less need for many of the roles they are presently serving.

**Question 4. In 2030, there will continue to be large differences between rich and poor countries in their capacity to innovate, as the latter will not have the necessary financial resources and personnel.**

The capacity to innovate is not dependent on resources and because of their status many poorer countries are forced to innovate because their survival depends on it. I'm not sure if this question refers therefore to the availability of resources to support innovation, but I assume that is what this question refers to and my answers are based on that.

I think that globalization is increasing more rapidly than ever before. For example, if an Ipad is produced today in one country, tomorrow it is sold in many countries which are too far. This shows effects of globalization and integration. Meanwhile, countries increase their capacity to innovate with globalization. For instance Azerbaijan had no technologies for extracting oil in the beginning of 90s. But after "Agreement of the century" which was in 1994 20 September many European corporations and others invested in Azerbaijani oil and now Azerbaijan has its potential to produce oil technologies and platforms.



**Question 5. The gap in the level of literacy between men and women will be reduced in developing countries, but with regional differences; the gap will be reduced by a larger degree in China, while in Africa, progress will be very slow.**

Africa will also narrow the gap.

The gap in literacy between women and men will continue to improve in developing countries aided by increases in non-formal sources of education such as social media and internet access, and Africa by 2030 could begin to accelerate the reduction in that gap more than China, which by 2030 will be wracked with internal strains between haves and have nots. The impact on business will be to expand the potential qualified labor pool in many developing countries which will attract additional FDI to those countries and provide opportunities for local and international businesses to build upon that. On the other hand, cooperatives could be an even bigger beneficiary of improvements in women's literacy rates if women become more active in coops, which with the increased literacy and tendency towards a bit more family and community responsibility should enhance their prospects.

**Question 6. By 2030, the gap existing between rich and poor countries as regards health care will be reduced thanks to advances in the biotechnology sector.**

I think the gap will be reduced but not necessarily through biotech

I don't believe that the gap between rich and poor countries will be reduced, due to the medicine prices and other high health care costs. I think the advances in the biotechnology sector won't play a key role in reducing that gap. However, with some economic measures aimed at e.g. lowering the medicine prices and with spreading the knowledge, the gap could be eventually diminished.

**Question 7. Higher intensity in the level of protectionism is expected on trade and investments at a global level.**

I think the impact on large enterprises will be bigger assuming their focus is to expand internationally, whereas it will be less for cooperatives, assuming they more often focus on a national level primarily.

This will be a function of corruption and criminal business activity and if that is controlled then prosperity will extend to more developing countries and the need for protectionism will reduce. Businesses and coops will suffer/benefit equally from this.

I agree with this point. Because as we see in our daily life relationships between many countries become severe (Israel - Turkey, Azerbaijan - Armenia, North Korea - other Asian countries, Iran - European countries, etc.) It will cause protectionism on trade and investments and even I think it will decrease amount of investments in countries where the conflicts are beginning.

**Question 8. In the case of the US, for example, the perception of inequality in the benefits of globalisation could intensify protectionism.**

Who's standard of living - Americans or the world as a whole?

USA could lose its hegemony in global markets by 2030.

**Question 9. In order to ensure that public-private collaboration continues to play its role over the long term, the European Commission will establish an effective cooperation and training framework to cover the public and private sector.**

I think the EU already covers private and public sectors, so the question is unclear. Maybe you mean that the EU covers the private sector more intensively in the future for example by giving up obstacles of the private sector of having access to EU financial support. I suppose in my answer that this is what is meant here.

There is a supposition that reinforcing public-private collaboration also in money terms is dependent - or is made dependent - on social responsibility of the companies or cooperatives. There is a bigger influence on the cooperatives because they have more competence and will in enhancing societal (joint) values and issues. Therefore, there is a bigger influence on cooperatives than on enterprises since there is always a part of enterprises that don't need to care about of societal will.

**Question 10. In the case of technological development and investments in R&D, the establishment of partnerships and cooperation networks will increase. In addition to the financial advantages, synergies will be developed in various fields as a result of collaborative agreements between companies, universities and research centers.**

In the context of EU the demand for complicated collaboration consortiums is already so big that I doubt if it can grow any bigger, at least at some points it has been driven into its extreme

**Question 11. Main future sectors: the aerospace industry, health and safety, environment and climate change, energy, industries linked to sustainable mobility and other industries linked to chemistry, engineering, transport, and agri-food. As regards sectors associated with future technologies: nanotechnology, micro and nano electronics, biotechnology, photonics, new materials and advanced manufacturing technologies.**

The future will be built from these new technologies, but we must not overlook the possibilities of completely new developments starting new technological domains; some examples that come to mind are: quantum applications, understanding dark matter, and fields that grow as a result of deeper understanding of the mind.

I would include the education sector, cultural/entertainment/sport industries

The list in this question bears no resemblance to the list in # 14 and # 45. Everything can't be "main" SECURITY! The word does not appear once in the delphi. In the absence of acceptable and appropriate security, 'business' is challenged to impossible. Some of the

biggest, and growing, companies in the world are security companies, providing the goods and services or using these goods and services to provide security. Check out SIPRI's numbers for arms sales and purchases. Check out the Walmart scenario. cyber security, food security, mine security, personal security, homeland security.....

**Question 12. By 2030, biotechnology will be especially important in developing countries, as regards agriculture (green biotechnology) and industry (white biotechnology), in order to combat climate change, demographic evolution and the limitation of natural resources.**

Yes, but it could be a double-edged sword (e.g. monopoly of technology undermine rural farmers livelihood).

Impact on business and coops will depend on the industry. Agri-food industry evolution could greatly affect coops that are producer memembr based, adversely or positively depending on their access and use of improved technologies.

**Question 13. Banking sector: The banks of emerging countries will catch up with those of the G-7 in 2036 and in 2050 they will be 50% larger. Chinese banks will catch up with those of the US in 2023 and in 2030 its assets will be worth 4 billion dollars more than American banks. India will overtake Japan in 2033.**

I believe that Chinese banks will have an intense growth. However, I am not sure about the level of advancement of banks in emerging countries.

Access to finance will transcend national borders and so it will not so much matter which banks are bigger as they will have to look across the globe for their business. Again, the businesses that learn how to access these resources will continue to be able to expand while those that rely only on local financial resources may end up paying more.

**Question 14. In 2040, the main sectoral Clusters will be the following and located in:**

- **Asset management: London, New York, Singapore**
- **Pharmaceutical Industry: London, New York, Singapore**
- **Automotive assembly: Sao Paulo, Nanjing (China), Tianjin (China)**
- **University education: New York, Boston, London**
- **Cinema and entertainment: Los Angeles, Mumbai, Shanghai**

I would have split this into separate questions, because asking what the probability is of this happening for all 5 main sectoral clusters diminishes the value of such a question.

Though Continent Europe and Japan are now in difficulties I believe in their strong position especially in biomedicine and in tools for independent living of elderly people. The amount of elderly people is an important reason for it.

By 2040 there may be a trend back towards more dispersed local finance and industry clusters rather than huge concentrations as described here. Energy costs, cost of living and quality of life and technology advances (Appleware, etc. that allow easlier editing of videos, etc. may be factors that drive things away from more concentration towards more dispersal.

**Question 15. Those countries with the greatest demographic and per capita income growth will be considered as the most attractive geographical markets.**

IF/IF there is acceptable/appropriate security or person, place, rights under law.....

The stability and safety will be big problems in countries of great demographic growth. The big risk of shanty cities that are out of control.

**Question 16. Real GDP will grow 4 times more quickly in developing countries than in developed countries, reaching annual growths of 6.7%.**

This would depend on the effect of the current global economic climate, as well as the impact of natural disasters which have led to an unprecedented increase of foreign aid to developing countries in the last decade.

I think that the growth will not be that high. Besides, a proper policy is needed to regulate an economic situation, especially in the period of a recession.

The big growth rates in developing countries may have passed their peak by then and be slowing, so 6.7% may be high in 2030. But the impact on business and coops will be great as it will require shifting their market focus and perhaps their operations as well more towards the fastest growing emerging economies.

**Question: 17. China's GDP will exceed that of the United States to become the biggest economy in the world in 2026.**

According to my opinion, Chinese economy will be the world's largest in the stated period, maybe even before.

It'll happen if China's leaders can keep ahead of internal dissent and unrest in Western China resulting from growing inequities between regions. And that has implications for businesses all over the world. Coops will be less affected because they are more local on average.

I think with the cheapest labour China will attract many corporations and projects, which will cause the economy (GDP) of China to rocket. Meanwhile, China will be the largest holder of U.S. Dollar, which may give an opportunity to China to dominate the global economy and markets.

**Question 18. The BRIC countries will continue to be the most interesting markets for Direct Foreign Investment in 2030. By 2030, the share of exports of the BRIC countries compared with world exports will be on a par with the European (EU 27) export share, of approximately 23%.**

This also now includes South Africa as the 5th country in BRICS. Based on the consumption of natural resources and economic growth in these countries, as well as a strong entrepreneurial spirit this is very probable.

Trends are already showing that some BRIC countries' growth is slowing while some emerging economies are accelerating and that trend could continue because of raw material and labor resources.

**Question 19. Exports from India will grow by 13% per year until 2030, followed by China (7.1%), Brazil (6.5%) and Russia (4.9%).**

Almost no chance that these numbers will be met exactly. A lot can go wrong.

Do not know why the question is important. What if each number is changed + or - by 1 percent. So What?

This question would have a lot more value if it addressed each country separately. The probability of meeting exactly these figures for all 4 countries would be quite low.

Unless India's government leadership can get the bureaucracy out of businesses way, India will become too expensive to continue to be the exporter of choice. The implications for business is that if Indian exports do not continue to grow and drive improvements in GDP and per capita GDP, then many business around the world will be affected by reduced growth rates in India.

**Question 20. Increase in purchasing power: The middle class in BRIC countries will grow by 150% from 800 million currently to 2000 million by 2030.**

I am not convinced that simple growth in population implies an associated growth in purchasing power. There are a lot more factors that would impact on purchasing power of the middle class, such as employment, education, growth in GDP, exports/ imports and so on.

Unless there is a prolonged period of world peace and prosperity without major political swings that undermine investor confidence in the BRICs, then that grow rate is overly optimistic.

**Question 21. "Next Eleven" Countries: Bangladesh, Egypt, Indonesia, Iran, Mexico, Nigeria, Pakistan, Philippines, South Korea, Turkey and Vietnam. Their real GDP will grow by 5.9% annually over the next 20 years, reaching 30% of the total GDP of the BRIC countries and 11% of world GDP.**

What are the criteria for inclusion in this list of 11 countries? If political considerations have any weight, then several should be excluded. What about Chile, Ghana, Angola?

Political instability may cause problems in achieving those numbers.

**Question 22. South Africa, Nigeria, Egypt and Angola will be the African countries with the highest growth. Africa will increase its world exports from the current 2.8% to 7.1% by 2030.**

Depends on ability to eliminate or control corruption and avoid civil war

It is not clear to me on what basis Angola is selected for this. What about Zambia or Uganda or Tanzania?

**Question: 25. Extra-financial factors: brands, technology, capacity for innovation, information systems, customer relationships, business culture values, image or reputation will, like intellectual capital, contribute to the strengthening of companies and to the fundamental improvement of capabilities and competencies in the medium to long term. Consequently, it can be seen that the mission of managers must be to maximise expectations for value in the long-term, despite some short-term gain sacrifices.**

Profit will still be king, and the short term, unfortunately, will likely win out over the longer term

I believe that stated extra-financial factors will have an increasing role when they are continuously developed and when their effects are monitored.

**Question 26. According to Forrester consultancy group, the mass customisation of the future will be more social, physical (technologies such as Microsoft XBOX Kinect, etc.), mobile, intimate (even more customised), integrated (greater change of products), based on platforms (shared technologies) and co-created (using customisation to create more significant solutions and standard products). These products will lead to unprecedented customer loyalty levels and will generate a strong product market differentiation.**

I think the first sentence captures a likely trend. But the second sentence does not necessarily follow.... I think customers will become increasingly sophisticated in their ability to keep testing market values for the products and services they want

I think it is also possible to become socially "too interconnected" with special mental health problems. There is a possibility of reinforcing individuality and the protection of individual minds.

**Question 27. For 2020, global investment demand could reach maximum levels and consequently, the difference between capital demand and savings will probably increase real interest rates in the long term. For this reason, companies, financial institutions, consumers, investors and governments will have to adapt to a world in which capital is more expensive and less abundant, and where more than half of savings and investment is concentrated on emerging markets. This means that business models should evolve, investors should develop new strategies and governments could play a significant role in facilitating this transition.**

Will be good for investors who need high rates of return on invested capital

Due to the non-reliable relations, uprisings in many countries, risks of financial crisis, etc. governments and corporations do not prefer to invest in many parts of the world. With decreasing range of areas to invest global investment will be "bread & butter" for many developing countries. According to the government, I think governments are the worst investors, because they do not think long-term perspectives but concentrate on short-term forces. We can see its obvious results in many countries which struggle with financial crisis like Greece.

**Question 28. In the 2020s economic system, productive entrepreneurship will be acknowledged and supported. It will be encouraged by a policy of stricter competition that will better serve growth through innovation rather than by mergers and acquisitions. Institutional structures will be established to provide long-term finance for companies that enter new areas such as those of the low carbon economy, to improve the use of existing technologies or transform cultural and creative value into new commercially exploitable products and services, including investments in brand value.**

I think that it is as likely to proceed towards social entrepreneurship as focusing on growth, I don't take growth-driven policy as self-evident

I support an approach related to an importance of innovations, at least when I apply it to the pharmaceutical industry. A recent lack of innovative medicines leads to reduced therapeutic benefits. Common efforts for enlarging the care for the health of the population, rather than promoting short economic benefits, would lead to long-term benefits.

**Question 29. The concept of non-ownership will emerge, as distinct from private ownership or state ownership. An example of this is open source software.**

We're there already

Everything belongs to someone or some 'thing'. Like 'cooperative', "non-ownership" however the delphi writer sees the term, is fungible in the absence of a definition. A cooperative in my country is very very different to one in the neighbour, and, in both countries the sub-jurisdictions impose uniquenesses.

**Question 30. Self employment via Internet - individuals seek markets for their abilities rather than jobs. New simpler methods will be developed so that individuals can invest directly in start-up companies and in research.**

May happen but big corporations will still rule the day

**Question 31. India will continue to maintain its world leadership in Information Technology Business Process Outsourcing (IT-BPO), the Indian market increasing from 71,600 million dollars in 2009 to 285,000 millions of dollars in 2020, with an annual growth of 15% approximately.**

There will be a great effort to call jobs back to the country of origin as long as global unemployment is high. Additionally, no country holds a lead of this sort forever- there will be less expensive and talented labor elsewhere.

I have lived in India for several years and continue to take an active interest in this country. The benefits of Indian maintaining its world leadership in IT-BPO, will not necessarily be realised by the thousands of workers in this sector.....For India to remain competitive, their standard of living may not rise much

**Question 32. Another option will be to outsource innovation to other network business partners, thus distributing the value of the innovation along the value chain, thus reducing the cost to the companies.**

If one outsources (the task of?) 'innovation', surely it becomes their innovation not yours.

**Question 33. Thus, it is predicted that in 2020 polarisation between large multinationals and small business projects developed over a network will take place:**

- On the one hand, there will be a market dominated by multinationals that will be increasingly large and influential and will have a budget larger than many countries.
- On the other, organisations will have smaller and less hierarchical structures made up of networked professionals working on projects and in different countries. Many of these professionals will not even form part of the organisations, but will be grouped together in collaborative networks and offer services and products of high added value to those multinationals.

**In both cases, the companies will be more flexible, diverse and dynamic.**

I give it low probability because there are too many parts to this forecast and thus some parts may be true but others not.

I think that at least partly a polarisation already takes place, meaning powerful large companies and flexible smaller companies with an advantage of quick adjusting to changing circumstances. However, their mutual cooperation often has to be established.

**Question: 36. According to the “AI(1)one” Scenario of the report “Worker Participation 2030. Four scenarios”, the 2020 decade will see a development in the concept of cooperatives as organisations made up of various groups to achieve their specific common objectives, in fields such as energy, health, mobility and the financial sector for supporting local projects. In this context, to seek the size of company appropriate to the organisation's objectives instead of growth as an end in itself, it will limit the risk of losing direction and entering a spiral of "more growth or die".**

I agree cooperatives will grow, but this question is much too complicated to give a single probability answer.

**Question: 37. Management by understanding is developed as distinct from by objectives or authority, so that each employee has an understanding of the whole organisation, making decisions in a fast changing environment.**

Sure, in some organizations, particularly start ups, but certainly not all and not likely for large established corporations.

It is a very nice concept, but only realistic in the companies where human capital is appreciated.



**Question 38. According to the "Global Interest" Scenario for 2018, an effective globalised response to global challenges leads to an increase in resource productivity and low carbon growth. Successful companies have integrated sustainability management throughout the organisation. Corporate Social Responsibility (CSR) departments belong to the past.**

In the mining and extraction industries, CSR (which may in the future include CS Reciprocity) are growth 'industries', "or else". There was no stronger message at the just completed PDAC conference in Toronto (which representatives from every/every big and international mining company attended)

I think that CSR departments will still partly keep their purpose.

**Question 40. As global knowledge connectivity and generation increases, companies need to establish a system that combines knowledge from different areas in an efficient, up-to-date network. Openness to the knowledge of others, knowledge sharing and common knowledge creation will become key targets for enterprises. For this, social networks, semantic web technologies and open innovations will play an important role, Web 2.0 will advance to Web 3.0.**

I find an interdisciplinarity essential for the future development.

**Question 42. According to the report "The Future of Corporate Innovation", the centralised R&D models will be replaced by open innovation structures. The vision for the Innovation Network: Simple, transparent, instantaneous and with global access to globally distributed R&D resources and services.**

An open access to the innovations is preferred, rather than the innovations which are too long protected by the patents and are therefore monopolistic.

**Question 44. Occupations requiring highly and poorly skilled workers in the job market will increase in terms of jobs and salaries but the number of semi-skilled workers will decrease, leaving rich countries with an hourglass economy.**

I have no idea what to write. A highly-skilled worked in my country, may or may not be similarly designated elsewhere, but unskilled and semi-skilled have as many definitions as there are countries

**Question 47. The economic valuation of a job continues to change to a more subjective perception of the post, with a demand for conditions that take diversity into account as well as measures that help to achieve a better balance in all aspects of life.**

Again a nice concept, however not often realized in the companies I observed.

**Question 48. In two decades time there will be more equality between men and women. The differences between men and women as regards primary education will be nearly non-**

**existent by 2030. As of secondary education, the difference will decrease considerably, to 48% of men and 40% of women.**

I gave a low probability estimate because I believe that by 2030, women will have higher percent estimate than men in secondary education: 48% of men, 50% of women is more like it.

It may be valid globally, however with large geographical deviations, in the areas where women are still underprivileged.

I agree with this point but these numbers belong to global indicators. When we investigate region by region we will see that in many African and Asian countries there is also great diversity and inequality between men and women.

**Question: 50. There are 240 million migrant workers in the world. It will be important, therefore, to maintain open borders to encourage the movement of qualified workers, and agreements will be defined to facilitate immigration, for example, through the creation of a code that regulates migrant flows at a global level. Furthermore, intercultural management within organisations will be another challenge that will enrich their knowledge and will acquire particular relevance in the interrelationships and/or conflicts between workers with other cultures and societies different to those of the country of origin, and it will go beyond the vision of a work approach from the perspective of a single culture to a multicultural vision as demanded by an increasingly competitive market.**

Multicultural vision is quite fascinating but it will cause some problems for governments and increase population in one side of the world, decrease the population in another side.

**Question 54. Organisations will develop strategies to attract talent focussed at a global level, beyond local and national borders. With the aim of attracting the best professionals, organisations will intensify their cooperation with universities. Furthermore, talent retention strategies will become key aspects for companies and organisations, with the aim of strengthening the workforce and work teams.**

Talented people should be the core of development and international networks for discovering them and enabling their further advancement should be established.

**Question: 55. For 2030, globalisation of the job market will lead to the migration of workers to places and countries with attractive job markets and societies with a good quality of life where "talent attraction" will be seen, while other countries will experience a "brain drain".**

I believe that a migration of talented workers will take place, although several factors, other than a better working opportunity, are usually considered before moving elsewhere. A 'brain drain' effect is often seen in the countries where a competence is not a major issue at employing or estimating working results.

**Question: 60. Variable: There are co-operatives in all the world's countries, and it is estimated that 1000 million people are members of cooperatives.**

One of the more feasible ways to form new companies. Around the cooperative movement in small businesses is a solution to the crisis

**Question: 63. Variable: Distribution by sectors of these 300 cooperatives is as follows: 30% in agriculture and food; 23% in the retail trade; 22% in insurance; and 19% in the banking sector.**

agriculture & food: 25% retail: 25% insurance: 22% banking: 20% other -- S&T research & start-ups: 8%

agriculture & food: 25%; retail: 25%; insurance: 22%; banking: 28%

agriculture: 40%; banks: 10%; the others diminish

agriculture and food: 15% ; retail trade: 28%; insurance: 28%; banking: 29%

**Question: 71. What other development(s) might impact future business organizations developments with impact on cooperatives?**

I think decreasing amount of corruption will surely impact future business organizations because corruption always makes "the root to become weak".

The development of energy alternatives to oil, ie, photovoltaic, wind, tidal ... and of course the greater involvement of workers in production and profit of the company and reduced State involvement.

The stop on education progress.

SECURITY (even including in the face of >>corruption>>and plutocracy, and kleptocracy, and autocracy, and....

Regulation supporting cooperatives -- such as reduced bureaucracy and financial and employment security incentives -- for encouraging cooperation among self-employed and SMEs.

The development of cooperatives may be an important driving force in increasing employment and reducing the migration of people, especially in developing countries with high unemployment. In Russia, with the peak of cooperatives development in the 90s, it is fair to say that the following factors contribute to the emergence and development of cooperatives: - Availability of standard legal documents (Charter and others) required to set up and launch a cooperative without unnecessary bureaucratic delays; - Support from local authorities, protection against criminal elements, anti-racketeering, tax exemptions; - Good reason to arrange free short-term training courses for people who want to organize a cooperative. I think that a very effective way of creation and development of cooperatives in developing countries which lack skilled labor could be inviting relevant temporary managers to organize new cooperatives and lead them, or to serve as consultants in their formation.

Local authorities or government agencies could take the responsibility for inviting such managers and their remuneration. Moreover, international humanitarian and nongovernmental organizations, possibly the United Nations, could claim some responsibility and partial cost of setting up the training courses and inviting the temporary managers to develop cooperatives in such countries. This could be in the form of humanitarian assistance as an example. An ancient proverb says: "If you want to feed a man full once - give him a fish. If you want to feed him full for the rest of his life - give him a fishing rod and teach him how to fish."

A coordination of internal organization with external environment.

Lack of social responsibility and government awareness of the importance of cooperatives as an organizational form of business association of interested people with the aim of achieving a better life.

**Question: 72. What other Variables should be considered when assessing the trends for cooperatives?**

International conflicts; financial risks and struggling with them; -etc.

Apply strictly Surplus Distribution in Proportion to the Operations: This principle called Howart, is the essence of cooperation is in the sense of affirmation and denial of service profit solidarity, noting the difference between cooperative associations and civil society and business. The surplus obtained, ie the difference between cost price and selling price, are distributed in proportion to transactions and not in proportion to capital invested. The higher spending, higher savings.

The organizational culture. The society must advance to a collective thought, but its difficult.

Corruption in cooperatives

Political situation

Climate changes by regions and unforeseen natural disasters in the coming period.

## 6. The Participants

The panel of international experts was selected by the Millennium Project Nodes and Prospektiker in collaboration with LKS, Mondragon, and others linked to the International Cooperative Alliance (ICA) and government agencies.

About 200 people from 51 countries signed in, out of which 107 people from 38 countries responded to at least one question. The country with most respondents was Spain, the initiator of the study. Respondents provided 10,111 answers. A total of 349 reasons were given for the answers and there were 3 general comments.

Figure 7. Number of Participants who provided Answers, by Region

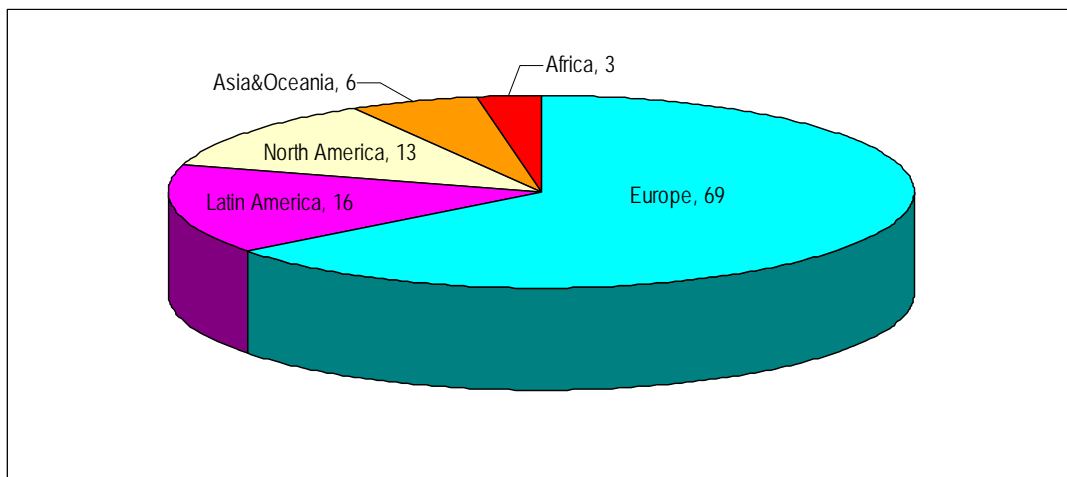
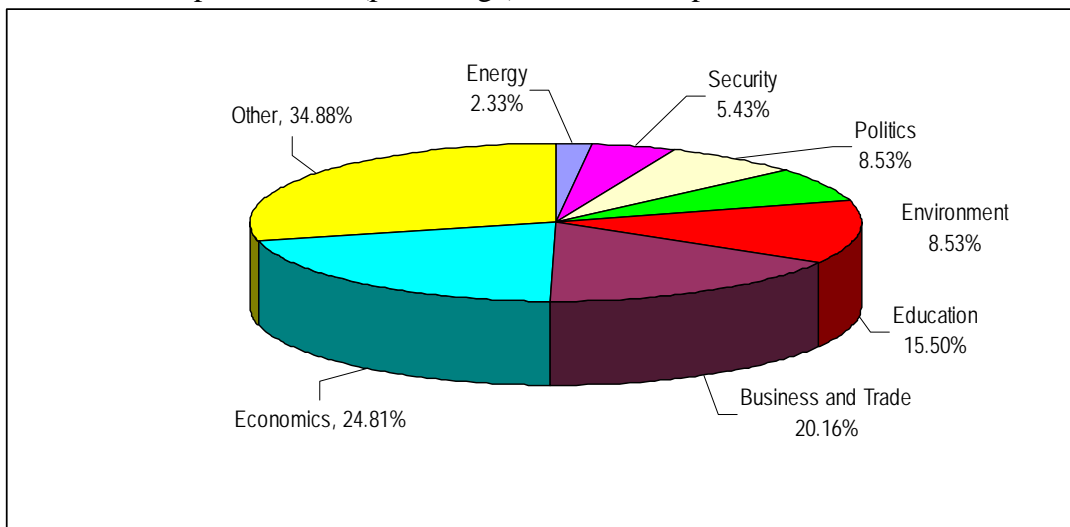


Figure 8. Sectoral Representation (percentage) of the Participants Who Provided Answers



## Appendices

### Appendix A. Reasons Provided by Respondents

**Question: 1. Globalisation will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP.**

*La globalización continuará, con un crecimiento de las exportaciones y de la Inversión Extranjera Directa (IED) mayor que el del PIB.*

Detailed Question: The average increase of global GDP will be around 4%, below the average of 5.3% over the last 20 years. In 2030, exports will account for 33% of Global GDP, as opposed to 26% in 2010 and 17% in 1990. (Sources: IMF; GOLDMAN SACHS; STANDARD CHARTERED BANK; EIU; WORLD BANK; ROLAND BERGER)

*El aumento medio del PIB mundial será del entorno del 4%, por debajo de la media del 5,3% en los anteriores 20 años. En 2030, las exportaciones supondrán el 33% del PIB Global, frente al 26% en 2010 y el 17% en 1990. (Fuente: IMF; GOLDMAN SACHS; STANDARD CHARTERED BANK; EIU; WORLD BANK; ROLAND BERGER)*

REASON: 1 The exponential expansion of the availability of global information and communication at decreasing cost will insure globalization will continue. Home country bias in investment will continually decline.

REASON: 2 Unemployment will be the only possible break on globalization; cure unemployment and globalization will accelerate

REASON: 3 There seems to be a bifurcation, or maybe a segmentation of society into two groups, and it will take a long time, perhaps several generations for that to iron itself out. I happen to think that the situation is far more fragile and complex than any current political system has the capability to handle. Think Ashby's Requisite Variety: there are far more degrees of freedom in play than the gross oversimplifications and reductions will support.

REASON: 4 La globalización será un eje motriz de todas las economías. El intercambio mundial crecerá ante la necesidad de crear nuevos consumidores.

REASON: 5 LA GLOBALIZACIÓN ES UN PROCESO YA IRREVERSIBLE, AUNQUE HA OCASIONADO MULTIPLES BENEFICIOS A MUCHA GENTE, POR OTRO LADO, HA OCASIONADO PERDIDAS DE EMPLEOS Y MARGINACIÓN, DE MUCHOS SECTORES E INCLUSO PAISES

REASON: 6 globalization will continue and grow.exports from the USA will grow...but direct foreign investment will not be greater than GDP

REASON: 7 La globalización se vera influida por la falta de crédito, la falta de consumo en los países más desarrollados y por los movimientos proteccionistas de todas las partes interesadas. Las necesidades de materias primas provocaran inestabilidad política, social y económica. La actual crisis económica en Europa lastrará el desarrollo del continente entre uno y dos lustros y eso repercutirá en los socios económicos. No creo que Centro y Sur América, África, Asia y Oceanía puedan ejercer de tractores. EE.UU. de América del Norte y Japón son junto a Europa zonas en declive. No creo que los nuevos equilibrios surjan antes de 2050.

REASON: 8 La globalización continuará pero no se extenderá a todos los países, hay algunos países que por su economía interna no serán arrastrados por esta corriente ya que los costos de incorporación son mayores que los beneficios que obtendrán los corporativos o los gobiernos de los países del primer mundo.

REASON: 9 Para responder he entendido que se preguntaba si el ratio de crecimiento de las exportaciones y la DFI seria mayor que el ratio de crecimiento del PIB. La globalización continuará debido al declive de las grandes economías tradicionales.

REASON: 10 La inversión extranjera es parte del PIB, así que desligarla en un poco difícil.

REASON: 11 La lógica del Modelo de desarrollo económico a nivel mundial nos lleva a pensar que la internacionalización crecerá ne mayor medida que el PIB.

REASON: 12 La globalización seguirá una progresión imparabile siendo su valor ambivalente. Lo peor es el paso de lo económico a lo político sin pasar por el filtro democrático de participación ciudadana.

REASON: 13 Globalisation will continue, bit it will be delayed due to the recession cycles.

REASON: 14 Globalisation will continue because the added value for international business organisations is high to use the differences among countries situation in the world to increase their profit and strenghten their situation in the global competition. This restructuration of the world economy could create great instability and crisis in numerous countries until a new stabilistion would emerge. The new situation could greatly increase the world situation as a whole provided that this huge change could be kept under tight political control at world level to soften the negative consequences of the transition.

REASON: 15 The proportion of sources and number of users of material resources will continue to shift towards emerging economies as the source of raw matierals but also the processing thereof, which will require FDI and drive exports. The largest enterprises are best positioned to take adavnatge of that. However their advantage could be reduced through internet lead fair trade and social enterprise marketing and policy development in emerging markets. What could upset that apple cart is continued excessive corruption between governments and businesses and illegal commerce.

REASON: 16 Globalisation will continue to increase the division of work and specialisation of the production among countries. The major challenge for business organisations will be the creativity and forecasting skills. It is surely the major point for post industrial countries but the competition among emerging countries will also increase the need for creativity there.

REASON: 17 Sin duda muchas empresas se deslocalizaran, pero otras en búsqueda de otras oportunidades relocalizaran volviendo a sus orígenes y reorientado sus negocio.

REASON: 18 La economía mediana empezará a salir de la informalidad e iniciará un proceso de desarrollo. Las grandes empresas se enfocarán a buscar países donde el PIB es bajo y adecuarán sus negocios a hacer crecer sus mercados.

REASON: 19 El proceso es complejo ya que se seguirá produciendo una convivencia de la globalización con los localismos.

REASON: 20 The world is becoming more flat. After BRICS countries development Africa will be next to face extensive GDP growth by 2030. Resources will be more distributed around the world.

**Question: 2. New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc.**

*Se desarrollarán nuevas definiciones del PIB que incluyan todo tipo de aspectos del bienestar nacional: energía, materiales, ecosistemas, capital social y humano, etc.*

Detailed Question: Source: MILLENNIUM Project, "State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System"

*Fuente: Proyecto MILLENNIUM, "State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System"*

REASON: 21 ES IMPORTANTE DARLE CONTENIDO SOCIAL A LAS MEDICIONES MERAMENTE ESTADISTICAS YA QUE CON LA FRIALDAD DE LOS NUMEROS NO SE ESTAN REFLEJANDO OTRAS CONDICIONES, EN OCASIONES ADVERSAS SOBRE LA SITUACIÓN DE BIENESTAR DE LA SOCIEDAD

REASON: 22 I have assumed that you mean new measures of progress which broaden the current focus on GDP as a sole measure of progress and have answered accordingly.

REASON: 23 Governments are too slow to incorporate new measurements and common standars regarding energy, taxes, and in general common economic measurements.

REASON: 24 My answer is based on factors such as how long it has taken governments to arrive at a point where the concept of carbon credits is becoming a standard policy issue, or how long it has taken to incorporate public health into decision making or to establish an enabling environment for creation and growth of new businesses, arriving at new deifnitions for GDP that incorporate social and human capital, learning and knowledge management capacity and assuming this would require similar amount of time.



REASON: 25 Es básico que las acciones y medidas desarrolladas tengan una visión de cuáles son las necesidades sociales y del contexto del lugar.

REASON: 26 I believe a need for a broader definition of GDP will be recognized in future years, since the present one doesn't give the whole picture.

REASON: 27 My view is that this is already happening. Ongoing crises with current economic rationality and system will begin to valorise and eventually catalyse this shift.

REASON: 28 If it's only a classification issue of existing economical activity I do not see, at this moment, how this could have a huge impact in either enterprises or cooperatives

REASON: 29 If the new definitions of GDP are changed to include measures of happiness, the organizations may have to offer new products and profit may not be so important any more. But of course no matter what the definition, they have to support themselves.

REASON: 30 Enterprises will adapt to whatever the market is. Therefore it does not matter so much whether the market shift more towards purely material goods or entertainment or education or religion, business will shift what it offers accordingly. Yes, it might change what products services they offer, but not so much the nature of enterprise. That change will take longer than 20 years to occur.

REASON: 31 La introducción de nuevos valores en la valoración del PIB o su sustituto puede influir en las empresas en tanto tenga en cuenta valores ecológicos, de responsabilidad empresarial o social. Desgraciadamente acuerdos como la moratoria de la caza de especies en peligro de extinción, el acuerdo de Kioto, o el cambio climático no parecen estar al alza, y ciclo de interés parece decaer. Se necesitará al menos una década para poder poner el foco de nuevo en estos temas, o en los Objetivos del milenio de ONU.

REASON: 32 Puede influir en las empresas en cuanto tenga en cuenta valores ecológicos, de responsabilidad empresarial o social.

Question: 3. By 2030, the gap between rich and poor countries will be reduced and in the latter case it will especially important for helping to reduce poverty. The non-profit-making sector will become more important in both, developed and developing regions.

*En 2030 el gap existente entre países ricos y pobres se reducirá y en este último caso será especialmente importante para ayudar a reducir la pobreza. El sector sin ánimo de lucro ganará importancia tanto en las regiones desarrolladas y en desarrollo.*

Detailed Question: In fact, the dependence of poor countries on donations from rich countries will continue as an important aspect until 2030, as many of these regions will still have significant financial and social problems that they cannot solve themselves. Thus, the number of NGOs will grow significantly in the next 20 years as levels of democratisation, cultural changes and wealth progress, especially in Africa and Asia. Source: ROLAND BERGER, "Trend Compendium 2030"

*De hecho, la dependencia de los países pobres sobre las donaciones provenientes de los países*

*ricos continuarán como un importante aspecto hacia 2030, ya que muchas de estas regiones todavía tendrán importantes problemas financieros y sociales que no puedan solucionar por ellos mismo. Así, en los próximos 20 años el número de ONGs crecerá de forma importante a medida que se dan avances en los niveles de democratización, cambios culturales y riqueza, especialmente en Africa y Asia. Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 33 This question should be divided into two. One problem is "gap between rich and poor countries will be reduced" - I am not sure about it. On the other hand I believe "the non-profit-making sector will become more important".

REASON: 34 LAS ULTIMAS MEDICIONES NO REFLEJAN ESE DESEABLE PROPOSITO, POR EL CONTRARIO EL GAP SE HA VENIDO INCREMENTANDO, SEGUN SE PUEDE VER EN LAS ESTADISTICAS DE MUCHOS PAISES. EL INGRESO NACIONAL SE POLARIZA CADA VEZ MAS ENTRE LOS RICOS Y LOS POBRES

REASON: 35 There are two questions here. I have a different evaluation for each.

REASON: 36 En la mayoría de los países hay un proceso de concentración de la riqueza y creo que eso se repetirá en los países. El escalón se hará más grande aunque algunos países "suban" o "bajen" en el escalafón. Unos acumularán riqueza vía productiva y otro vía financiera y especulativa, y el capital se concentrará aún más. No descarto crisis financieras, monetarias o de mercado de valores a mayor escala que la producida a finales del siglo pasado, agudizado por los problemas y tensiones de las materias primas en general. El sector sin ánimo de lucro se habrá profesionalizado tanto que el gasto estructural y de mantenimiento de la organización lastrará las ayudas disponibles y se convertirán en grupos de presión globales alejadas del público que las sustenta. En 2030 su modelo generalizado actual estará en franca crisis y reinventándose. Muchas dellas estarán ocupadas que serán de poca ayuda.

REASON: 37 El gap siempre existirá surgirán algunos países que suban a ser países ricos y otros que bajarán a ser pobres pero una igualdad de la riqueza no es posible.

REASON: 38 This addresses two questions, but I have taken the liberty of assuming that the gap referred to here is purely in terms of economic/ financial wealth and the role of non-profit organizations in narrowing that gap. In terms of that I see a narrowing of the gap between rich and poor countries and also an increase in role of non-profit organizations.

REASON: 39 No veo que esa posibilidad sea real, sino todo lo contrario.

REASON: 40 According to the present global situation, I haven't observed diminishing the gap between rich and poor countries. Only intense, complex, systematic efforts in many areas, including economic and social ones, could lead to an improvement of that issue.

REASON: 41 Según se demuestra, ej de USA en primer lugar y ahora en CHINA) la diferencia rico/pobres es cada vez mayor.

REASON: 42 El escalón financiero que separará a los países influirá en las capacidades y flujos de crédito y capital, pudiendo ahogar muchas iniciativas y hundir empresas. El sector sin ánimo de lucro en las áreas de ayuda empresarial y préstamos de grandes capitales no estará desarrollado antes de 2050.

REASON: 43 This could happen if a few more governments of emerging economies take the plunge and persist in rooting out corruption in government and in criminal commerce (principally illegal drug trade and black market commerce). A more certain political and economic policy environment encourages FDI which is necessary to balance productivity levels between lesser and more advanced economies. Though there is a role for non-profit sector in this transition process, as the rebalancing occurs, there is less need for many of the roles they are presently serving.

REASON: 44 I think its impact on enterprises will be more because as we know if the gap between rich-poor reduces, the poor will earn more money and the purchasing power of overall buyers will grow, as a result, enterprises will be able to sell more products and they will grow more rapidly than the current situation.

REASON: 45 Las desigualdades podrán eliminar muchas iniciativas y hundir empresas. El sector sin ánimo de lucro en las áreas de ayuda empresarial y préstamos de grandes capitales no estará desarrollado hasta dentro de mucho tiempo.

**Question: 4. In 2030, there will continue to be large differences between rich and poor countries in their capacity to innovate, as the latter will not have the necessary financial resources and personnel.**

*En 2030 seguirá habiendo grandes diferencias en la capacidad para innovar entre países ricos y pobres, ya que estos últimos no contarán con los recursos financieros y personales necesarios.*

REASON: 46 LAS DIFERENCIAS CONTINUARÁN DE MANERA IMPORTANTE, LOS PAÍSES HOY DÍA MÁS POBRES, NO CUENTAN CON LOS RECURSOS FINANCIEROS PARA PODER PROPORCIONAR UNA EDUCACIÓN NI MEDIANAMENTE BUENA Y MUCHO MENOS LA NECESARIA, PARA EL MUNDO AL QUE SE ENFRENTARÁN LOS JOVENES.

REASON: 47 Las diferencias se mantendrán de manera significativa, aunque entre los países emergentes se agrandarán así mismo las diferencias.

REASON: 48 The capacity to innovate is not dependent on resources and because of their status many poorer countries are forced to innovate because their survival depends on it. I'm not sure if this question refers therefore to the availability of resources to support innovation, but I assume that is what this question refers to and my answers are based on that.

REASON: 49 Cada vez habrá mayores desigualdades entre los países.

REASON: 50 I think that assumption is very likely, since a capacity to innovate largely depends on the education level and research efforts, both related to the finances.

REASON: 51 I think, globalization is increasing rapidly ever before. For example, if an Ipad is produced today in one country, tomorrow it is sold in many countries which are too far. This shows effects of globalization and integration. Meanwhile, countries increase their capacity to innovate with globalization. For instance, Azerbaijan had no technologies for extracting oil in the beginning of 90s. But after "Agreement of the century" which was in 1994 20 September many European corporations and others invested in Azerbaijani oil and now Azerbaijan has its potential to produce oil technologies and platforms.

REASON: 52 Without significant reductions in crime and corruption in emerging economies and continued lack of real global leadership in developed economies, this will very likely occur because investment environments will not be good enough to encourage the transfer of sufficient resources (monetary and human resources) to increase the capacity to innovate in poor countries. The impact on coops could be counter to this trend as a kind of backlash reaction to the corruption and criminality. That said, corporations are better able to defend themselves from infiltration of criminal elements than coops are and therefore, the coops will suffer more than businesses.

REASON: 53 La innovación e investigación es básica para el progreso de un Estado, si no se produce la regresión está asegurada.

REASON: 54 Sin capacidad de innovar las empresas son esclavas de las patentes ajenas, siendo estas una rémora económica e intelectual. Tengo la esperanza que los esfuerzos para erradicar el analfabetismo y las inversiones en educación permitan una mayor innovación aunque las investigación básica a gran escala y gran maquinaria será restringida a los socios de las grandes máquinas construidas con grandes cantidades de capital.

REASON: 55 EN ESTOS PAISES, NO SOLO ES IMPORTANTE QUE EL GAP SE REDUZCA, SINO QUE ES NECESARIO, PERO NO DEBE OLVIDARSE, QUE NO SOLO SON FACTORES EXTERNOS LOS QUE INFLUYEN, TAMBIEN HAY RAICES CULTURALES MUY PROFUNDAS QUE SERA MUY DIFICIL ,CAMBIAR AUNQUE SEA ABSOLUTAMENTE NECESARIO HACERLO EN EL MENOR TIEMPO POSIBLE

REASON: 56 There are too many presuppositions in the question, therefore it is almost impossible to give a viable evaluation

REASON: 57 El nivel educativo de hombres y mujeres se equiparara principalmente en los países que están teniendo un desarrollo acelerado como China o India, esto debe ser un proceso lógico como parte del desarrollo y de la infraestructura necesaria dentro de las sociedades.

REASON: 58 I assume that this means results that will be normalised and reflecting the average.

REASON: 59 Es necesario hacerlo pero no es nada fácil.

REASON: 60 I agree with the first assumption that in general the gap in the level of literacy between men and women will be reduced in developing countries. I am not sure about the degree differences between the countries, since I am not familiar with a literacy progress there.

REASON: 61 Africa will also narrow the gap.

REASON: 62 La mejora de la educación facilitara la creación industrias y tecnologías intermedias, facilitando el auto desarrollo. Lastrará las ventas de la empresas medianas de los países más desarrollados.

REASON: 63 The gap in literacy between women and men will continue to improve in developing countries aided by increases in non-formal sources of education such as social media and internet access, and Africa by 2030 could begin to accelerate the reduction in that gap more than China, which by 2030 will be wracked with internal strains between the haves and have nots. The impact on business will be to expand the potential qualified labor pool in many developing countries which will attract additional FDI to those countries and provide opportunities for local and international businesses to build upon that. On the other hand, cooperatives could be an even bigger beneficiary of improvements in women's literacy rates if women become more active in coops, which with the increased literacy and tendency towards a bit more family and community responsibility should enhance their prospects.

REASON: 64 El desarrollo educativo será positivo en todo, pero la previsión es que el nivel de competitividad se eleve y las empresas medianas y pequeñas sufran una penalización.

**Question: 6. By 2030, the gap existing between rich and poor countries as regards health care will be reduced thanks to advances in the biotechnology sector.**

*En 2030 el gap existente entre países ricos y pobres en cuanto al cuidado de la salud se reducirá gracias a los avances en el sector de la biotecnología.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 65 I think the gap will be reduced but not necessarily through biotech

REASON: 66 El desarrollo médico en los países depende del desarrollo económico ya que los avances son caros de implementar, sin embargo, la globalización permite a los laboratorios y empresas de la salud exportar a más países los avances. Estos no serán a la misma velocidad que en los países desarrollados.

REASON: 67 Ese gap viene cerrándose desde hace algún tiempo. ¿La pregunta plantea que la tendencia aumentará o que continuará?, no es muy clara.

REASON: 68 El desarrollo médico vendrá ligado al nivel económico de las distintas potencias, si se produce, su impacto será muy positivo.

REASON: 69 I don't believe that the gap between rich and poor countries will be reduced, due to the medicine prices and other high health care costs. I think the advances in the biotechnology

sector won't play a key role in reducing that gap. However, with some economic measures aimed at e.g. lowering the medicine prices and with spreading the knowledge, the gap could be eventually diminished.

REASON: 70 Los países avanzados se preocupan tan sólo de su propio bienestar y ni tan siquiera consiguen que la sanidad llegue a toda su población.

REASON: 71 Medical enterprises will benefit. Coops could play a more significant role in the medical sector as the tendency to incorporate as not-for-profit will transfer from developed to developing countries to reduce health service costs.

REASON: 72 Muchas empresas no podrán vender sus productos por las patentes y altos costos de los tratamientos biotecnológicos. Es más, muchos países duplicarán sus esfuerzos para producir productos rompiendo las patentes o negociando mejores precios. Se necesita un cambio de paradigma de salud y de la disposición de los recursos.

REASON: 73 Muchas empresas no podrán vender sus productos por las patentes y altos costos de los tratamientos biotecnológicos.

**Question: 7.Higher intensity in the level of protectionism is expected on trade and investments at a global level.**

*Se espera una mayor intensidad en el nivel de proteccionismo sobre el comercio e inversiones a nivel mundial.*

Detailed Question: The increasing number of aggressive acquisitions by companies with headquarters in emerging economies will grow, many of these belonging to the State, which could raise political tensions, creating negative reactions against trade and foreign investment.

Source: NATIONAL INTELLIGENCE COUNCIL (USA), Global Trends 2025: A Transformed World

*Crecerá el número de adquisiciones cada vez más agresivas por parte de empresas con sede en economías emergentes, siendo muchas ellas propiedad del Estado, lo que podrá elevar las tensiones políticas, creando reacciones negativas contra el comercio y la inversión extranjera.*

*Fuente: NATIONAL INTELLIGENCE COUNCIL (USA), Global Trends 2025: A Transformed World*

REASON: 74 En tiempos de crisis la tendencia es de protección frente al "enemigo" en vez de colaborar con el "vecino". Sin duda las guerras son grandes motores de la economía y hacen grandes fortunas.

REASON: 75 Previsiblemente las corrientes proteccionistas irán ganando adeptos en los próximos años, y se solicitará una mayor defensa de los derechos de los trabajadores en los países emergentes que más se desarrollen.

REASON: 76 Con la crisis económica, habrá una parte de la población que querrá este tipo de actuaciones, pero no es tan claro que se vaya a producir en la realidad.

REASON: 77 I think the impact on large enterprises will be bigger assuming their focus is to expand internationally, whereas it will be less for cooperatives, assuming they more often focus on a national level primarily.

REASON: 78 This will be a function of corruption and criminal business activity and if that is controlled then prosperity will extend to more developing countries and the need for protectionism will reduce. Businesses and coops will suffer/benefit equally from this.

REASON: 79 I agree with this point. Because as we see in our daily life relationships between many countries become severe (Israel - Turkey, Azerbaijan - Armenia, North Korea - other Asian countries, Iran - European countries, etc.) It will cause protectionism on trade and investments and even I think it will decrease amount of investments in countries where the conflicts are beginning.

REASON: 80 Me preocupa más la repercusión del proteccionismo. No descarto la posibilidad de guerras por recursos a a partir de 2020.

**Question: 8. In the case of the US, for example, the perception of inequality in the benefits of globalisation could intensify protectionism.**

*En el caso de EEUU por ejemplo, la percepción de desigualdad en los beneficios provocada por la globalización podrá intensificar el proteccionismo.*

Detailed Question: Source: NATIONAL INTELLIGENCE COUNCIL (USA), Global Trends 2025: A Transformed World

*Fuente: NATIONAL INTELLIGENCE COUNCIL (USA), Global Trends 2025: A Transformed World*

REASON: 81 who's standard of living - Americans or the world as a whole?

REASON: 82 En el caso de EUA además habrá un autismo político frente a los sucesos internacionales, malas evaluaciones de riesgo y cierta tendencia al matonismo político internacional. En 2030 será un factor de riesgo e incertidumbre severo.

REASON: 83 Estados Unidos puede incrementar sus leyes de proteccionismo pero las presiones globales y los precios competitivos harán que esta situación se revierta.

REASON: 84 USA could lose its hegemony in global markets by 2030,

REASON: 85 I don't understand the question...

REASON: 86 Las tendencias proteccionistas llegarán así mismos a USA. Eso podría provocar una ralentización en el crecimiento económico mundial, pero podría ayudar a que se realicen reformas en los países emergentes, al menos en los más desarrollados.

REASON: 87 Estados Unidos puede incrementar sus leyes de proteccionismo pero las presiones globales y los precios competitivos harán que esta situación se revierta.

REASON: 88 En 2030 EUA será un mercado más o menos apetitoso, pero no será "el mercado", las empresas dependerán menos de él.

REASON: 89 Coops in the USA are big business as much as they are small. So they will be equally affected by any protectionism intensification.

**Question: 9. In order to ensure that public-private collaboration continues to play its role over the long term, the European Commission will establish an effective cooperation and training framework to cover the public and private sector.**

*A fin de garantizar que la colaboración público-privada siga desempeñando su papel a largo plazo, la Comisión Europea establecerá un marco de cooperación efectivo y capacitador entre el sector público y el privado.*

Detailed Question: The European Commission proposed the development of public-private partnerships as an objective for mobilising private and public investment with a view to recovery and long-term structural change. Source: EUROPEAN COMMISSION "Mobilising private and public investment for recovery and long-term structural change: development of public-private partnerships", 2009

*La Comisión Europea plantea como objetivo el desarrollo de la colaboración público-privada para la movilización de las inversiones públicas y privadas con vistas a la recuperación y el cambio estructural a largo plazo. Fuentes: COMISIÓN EUROPEA, "Movilizar las inversiones públicas y privadas con vistas a la recuperación y el cambio estructural a largo plazo: desarrollo de la colaboración público-privada", 2009*

REASON: 90 I think the EU already covers private and public sectors, so the question is unclear. Maybe you mean that the EU covers the private sector more intensively in the future for example by giving up obstacles of the private sector of having access to EU financial support. I suppose in my answer that this is what is meant here.

REASON: 91 La UE todavía estará tratando de resolver los últimos flecos de la crisis actual y la próxima incorporación de candidatos. Turquía, claro, seguirá sin estar plenamente integrada y se habrá perdido otra oportunidad en el Mediterráneo. La relación entre lo público y lo privado estará volcada hacia lo privado, pero los escándalos políticos estarán empezando a forzar un cambio de la tendencia, buscando un nuevo equilibrio con lo público más allá de 2030.

REASON: 92 La colaboración público-privada será un elemento clave en los próximos años.

REASON: 93 Es fundamental que se dé este paso y pienso que se va a producir,

REASON: 94 I think that EC will continue to encourage public-private collaboration, since it is an important element of a future success.

REASON: 95 Las empresas más afectadas serán los servicios de consultoría, servicios de atención al cliente, logística y almacenaje, las TICs, y las constructoras de infraestructuras de cualquier tipo. La vinculación al estado, y la relación política llevarán a grandes procesos de



concentración de empresa en busca de financiación y a la liquidación de departamentos sustituidos por contratos. Se crearán cuasi monopolios, o grupos de muy alta vinculación.

REASON: 96 There is a supposition that reinforcing public-private collaboration also in money terms is dependent - or is made dependent - on social responsibility of the companies or cooperatives. There is a bigger influence on the cooperatives because they have more competence and will in enhancing societal (joint) values and issues. Therefore, there is a bigger influence on cooperatives than on enterprises since there is always a part of enterprises that don't need to care about of societal will

REASON: 97 Las empresas más afectadas serán los servicios de consultoría, servicios de atención al cliente, logística y almacenaje, las TICs, y las constructoras de infraestructuras de cualquier tipo.

**Question: 10. In the case of technological development and investments in R&D, the establishment of partnerships and cooperation networks will increase. In addition to the financial advantages, synergies will be developed in various fields as a result of collaborative agreements between companies, universities and research centers.**

*En el caso del desarrollo tecnológico e inversiones en I+D, crecerá el establecimiento de partenariados y redes de cooperación. Además de las ventajas financieras, se producirán sinergias en diversos campos gracias a los acuerdos colaborativos entre empresas, universidades o centros de investigación.*

REASON: 98 In teh context of EU the demand for complicated collaboration consortiums is already so big that I doubt if it can grow any bigger, at least at some points it has been driven into it's extreme

REASON: 99 Creo que también habrá grandes empresas dedicadas a la investigación y granjas de patentes, que acogerán datos de la gran investigación básica paraestatal y lo convertirán en conocimiento aplicado, en patentes y en sus desarrollos posteriores. Habrá fusiones de centros de investigación y cotizarán en bolsa, serán apoyados por grandes fondos de inversión de alto riesgo. Y probablemente haya una burbuja como con las tecnológicas del 2000. El partenariado se volverá a concebir como un riesgo, estamos en una época más autárquica.

REASON: 100 Es evidente que se producirán colaboraciones de este tipo, por ejemplo creo que es muy importante la colaboración Universidad-Empresas y los distintos campos tecnológicos que en las Universidades existen ya. El problema es que haya la suficiente transparencia en su gestión.

REASON: 101 I find future synergies in various fields advantageous, or even essential for a survival of different institutions.

REASON: 102 Certain donors are beginning to reemphasize the R&D links between universities and government and private sector in the US and this will extend to regional agricultural R&D and possibly other actors in R&D. These technological collaborations are not new, and what is not mentioned is the role of government in supporting their establishment and operations. As far

as the impact of this on businesses and cooperatives, the more astute ones will take advantage of the government and donor subsidies.

REASON: 103 Muchas empresas serán el desarrollo de una patente y otras las comprarán. el resto producirán las piezas necesarias. En los servicios se patentarán los modos o procesos o bien se embutirán en plataformas tecnológicas patentables. El conocimiento tenderá a protegerse por patente o contrato. Habrá un pérdida de la cultura industrial.

REASON: 104 Aquí la labor de las Universidades es fundamental.

**Question: 11. Main future sectors: the aerospace industry, health and safety, environment and climate change, energy, industries linked to sustainable mobility and other industries linked to chemistry, engineering, transport, and agri-food. As regards sectors associated with future technologies: nanotechnology, micro and nano electronics, biotechnology, photonics, new materials and advanced manufacturing technologies.**

*Principales sectores de futuro: industria aeroespacial, salud y seguridad, medioambiente y cambio climático, energía, industrias ligadas a la movilidad sostenible y otras industrias ligadas a la química, ingeniería, transporte y agroalimentación. En cuanto a los sectores asociados a las tecnologías de futuro: nanotecnología, micro y nano electrónica, biotecnología, fotónica, nuevos materiales y tecnologías avanzadas de fabricación.*

Detailed Question: Source: EUROPEAN COMMISSION, "An Industrial Policy for the Globalised Era"

*Fuentes: COMISIÓN EUROPEA, "Una política industrial para la era de la globalización"*

REASON: 105 The future will be built from these new technologies, but we must not overlook the possibilities of completely new developments starting new technological domains; some examples that come to mind are: quantum applications, understanding dark matter, and fields that grow as a result of deeper understanding of the mind.

REASON: 106 you've missed the biggest one: the care economy; expected to outstrip all the others; projections see UK for example

REASON: 107 I would include the education sector, cultural/entertainment/sport industries

REASON: 108 The list in this question bears no resemblance to the list in # 14 and # 45. Everything can't be "main" SECURITY! The word does not appear once in the delphi. In the absense of acceptable and appropriate security, 'business' is chalenged to impossible. Some of the biggest, and growing, companies in the world are security companies, providing the goods and services or using these goods and services to provide security. Check out SIPRIs numbers for arms sales and purchases. Check out the Warmart scenario. cyber security, food security, mine security, personal security, homeland security.....

REASON: 109 La mayoría de las actividades están vinculadas a cosa que ni siquiera existen de forma tangible y todas sujetas a procesos patentables. La patente garantiza el monopolio de una forma legal.

REASON: 110 Embedded in all this are web and related technologies, but I don't know how one would include that here. I also agree that security and entertainment/ sport will be among these and that completely new domains will appear.

REASON: 111 To the main future sectors, included in the question, I would add the IT industry and services, supporting all others sectors, in the comments already mentioned educational sectors and a production of goods and the services, related to the changing demographic situation in many countries, e.g. aging of the population.

REASON: 112 I anticipate that technological advances in biotechnology (eg. zinc finger nucleases) will made at least modest changes in genomes of plants so safe that besides big companies (like Monsanto) small companies including cooperatives are able to use GM plants extensively with reasonable costs. This development is promoted also by advances of biomedicine. Though there will be problems related to the owning of patents the increase in the productivity of agriculture will be considerable.

REASON: 113 La mayoría de los productos fabricados y muchos de los servicios que se ofrecerán en 2030 no están creados aún, ni muchas de las empresas que los ofertarán. Es una oportunidad y un gran riesgo para las empresas actuales.

REASON: 114 Health care will be a leading industry in every country with an aging population. And any industry related to transport, energy, agri-food and communications will be influenced by technological developments. Businesses and coops that can take advantage of technological advances to improve their efficiency and respond to evolving market preferences will survive and thrive while those that don't may survive, but won't be thriving as other more nimble new businesses replace them across all industries.

**Question: 12. By 2030, biotechnology will be especially important in developing countries, as regards agriculture (green biotechnology) and industry (white biotechnology), in order to combat climate change, demographic evolution and the limitation of natural resources.**

*En 2030, en los países en desarrollo la biotecnología tendrá especial importancia, en relación a la agricultura (biotecnología verde) y a la industria (biotecnología blanca), para luchar así contra el cambio climático, evolución demográfica y limitación de recursos naturales.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 115 Muchos países en desarrollo ya habrán pasado varias revoluciones verdes que prometían el fin del hambre y sólo han mejorado los cultivo industriales de exportación con grandes costos medioambientales y sociales. Tengo mis dudas.

REASON: 116 Countries prioritize based on what their needs are, whether these are quantified in terms of political or socio economic or otherwise. To bring biotechnology into prominence would require more than political will and good governance, both of which form part of the key challenges faced by the developing world. It also requires resources and coordinated effort.

REASON: 117 I think that biotechnology will be very important in the future. However, some newly developed, advanced methods may also play an important role or even exceed an importance of biotechnology.

REASON: 118 yes, but it could be a double-edged sword (e.g. monopoly of technology undermine rural farmers livelihood).

REASON: 119 I anticipate that technological advances in biotechnology (eg. zinc finger nucleases) will made at least modest changes in genomes of plants so safe that besides big companies (like Monsanto) small companies including cooperatives are able to use GM plants extensively with reasonable costs. This development is promoted also by advances of biomedicine. Though there will be problems related to the owning of patents the increase in the productivity of agriculture will be considerable.

REASON: 120 Impact on business and coops will depend on the industry. Agri-food industry evolution could greatly affect coops that are producer memebr based, adversely or positively depending on their access and use of improved technologies.

**Question: 13. Banking sector: The banks of emerging countries will catch up with those of the G-7 in 2036 and in 2050 they will be 50% larger. Chinese banks will catch up with those of the US in 2023 and in 2030 its assets will be worth 4 billion dollars more than American banks. India will overtake Japan in 2033.**

*Sector bancario: Los bancos de los países emergentes alcanzarán a los del G-7 en 2036 y, en 2050, serán un 50% más grandes. La banca china alcanzará en 2023 a la de EEUU y, en 2030, sus activos valdrán 4 billones de dólares más que los de banca americana. India superará a Japón en 2033.*

Detailed Question: Source: PWC, "Top Industry Clusters in 2040 revealed"

*Fuente: PWC, "Top Industry Clusters in 2040 revealed"*

REASON: 121 El problema puede venir por los flujos de crédito y su politización. Esto ya se está viendo en la crisis actual y la lucha por los fondos soberanos y la búsqueda de socios financieros en china.

REASON: 122 I believe that Chinese banks will have an intense growth. However, I am not sure about the level of advancement of banks in emerging countries.

REASON: 123 El control del sistema financiero será clave en el nuevo escenario, y un elemento clave de competitividad.

REASON: 124 Si se mantiene el flujo del préstamo en términos razonables será neutral.

REASON: 125 Access to finance will transcend national borders and so it will not so much matter which banks are bigger as they will have to look across the globe for their business. Again, the businesses that learn how to access these resources will continue to be able to expand while those that rely only on local financial resources may end up paying more.

**Question: 14.**In 2040, the main sectoral Clusters will be the following and located in:

- **Asset management:** London, New York, Singapore
- **Pharmaceutical Industry:** London, New York, Singapore
- **Automotive assembly:** Sao Paulo, Nanjing (China), Tianjin (China)
- **University education:** New York, Boston, London
- **Cinema and entertainment:** Los Angeles, Mumbai, Shanghai

*En 2040, los principales Clusters sectoriales serán los siguientes, ubicados en:*

- *Gestión de activos:* Londres, Nueva York, Singapur
- *Industria farmacéutica:* Londres, Nueva York, Shangai
- *Montaje de automoción:* Sao Paulo, Nanjing (China), Tianjin (China)
- *Educación universitaria:* Nueva York, Boston, Londres
- *Cine y entretenimiento:* Los Angeles, Bombai, Shangai

Detailed Question: Source: PWC, “Top Industry Clusters in 2040 revealed”

*Fuente: PWC, “Top Industry Clusters in 2040 revealed”*

REASON: 126 Creo que se muestra una opción muy centralizadora. Creo en la capacidad de trabajar en red y tengo fe en la UE. Creo que la UE como red tendrá relevancia en esos u en otros sectores.

REASON: 127 I would have split this into separate questions, because asking what the probability is of this happening for all 5 main sectoral clusters diminishes the value of such a question.

REASON: 128 Pienso que la UE será muy importante.

REASON: 129 I am more familiar with the pharmaceutical industry, the university education and partly entertainment industry. I would agree with the stated location of the entertainment industry, but I think that main clusters related to the pharmaceutical industry and the university education would be located also elsewhere and would certainly include one of the Chinese centers.

REASON: 130 Though Continent Europe and Japan are now in difficulties I believe in their strong position especially in biomedicine and in tools for independent living of elderly people. The amount of elderly people is an important reason for it.

REASON: 131 By 2040 there may be a trend back towards more dispersed local finance and industry clusters rather than huge concentrations as described here. Energy costs, cost of living and quality of life and technology advances (Appleware, etc. that allow easlier editing of videos, etc. may be factors that drive things away from more concentration towards more dispersal.

**Question: 15.**Those countries with the greatest demographic and per capita income growth will be considered as the most attractive geographical markets.

*Serán aquellos países con mayor crecimiento demográfico y de renta per cápita los considerados como más atractivos mercados geográficos.*

Detailed Question: Countries that will increase their populations by more than 20 million in the next 20 years (to the year 2030), reaching a per capita GDP greater than 10,000 American dollars in PPP (Purchasing Power Parity) will be India, China, Nigeria, Indonesia, Brazil, Philippines, Egypt and Mexico (descending order by demographic growth). Source: ROLAND BERGER, “Trend Compendium 2030”

*Países que incrementarán su población en más de 20 millones de personas en los próximos 20 años (al año 2030), alcanzando un PIB per cápita superior a los 10.000 dólares americanos en PPP (Paridad de Poder Adquisitivo) serán India, China, Nigeria, Indonesia, Brasil, Filipinas, Egipto y México (orden descendente por crecimiento demográfico). Fuente: ROLAND BERGER, “Trend Compendium 2030”*

REASON: 132 IF/IF there is acceptable/appropriate security or person, place, rights under law.....

REASON: 133 El planteamiento se olvida del reparto más o menos homogéneo del ingreso per cápita, que es lo que aporta el interés al volumen demográfico.

REASON: 134 The stated countries will be considered as the most attractive geographical markets, with some assumptions, already described on the right side, and with acceptable investment risks.

REASON: 135 Los países emergentes serán grandes ofertantes y demandantes. De hecho alguno de ellos dejará de ser emergente.

REASON: 136 The stability and safety will be big problems in countries of great demographic growth. The big risk of shanty cities that are out of control.

REASON: 137 The better the markets, the better for whatever kind of business or cooperatives either in those markets or serving them.

**Question: 16. Real GDP will grow 4 times more quickly in developing countries than in developed countries, reaching annual growths of 6.7%.**

*El PIB real de los países en desarrollo crecerá 4 veces más rápido que en el caso de los países desarrollados, alcanzando crecimientos del 6,7% anuales.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, “Trend Compendium 2030”*

REASON: 138 El crecimiento del PIB sin un buen reparto puede dar situación muy explosivas.

REASON: 139 This would depend on the effect of the current global economic climate, as well as the impact of natural disasters which have led to an unprecedented increase of foreign aid to developing countries in the last decade.

REASON: 140 I think that the growth will not be that high. Besides, a proper policy is needed to regulate an economic situation, especially in the period of a recession.

REASON: 141 The big growth rates in developing countries may have passed their peak by then and be slowing, so 6.7% may be high in 2030. But the impact on business and coops will be great as it will require shifting their market focus and perhaps their operations as well more towards the fastest growing emerging economies.

REASON: 142 Deben elegir bien su internacionalización y los mercados de exportación o implantación

**Question: 17.China's GDP will exceed that of the United States to become the biggest economy in the world in 2026.**

*El PIB de China superará al de Estados Unidos para convertirse en la mayor economía del mundo en 2026.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 143 Question is amiguous- which do you mean 2030 or 2026. There is almost no chance that it will happen precisely in 2026 Standard of living where? In china?

REASON: 144 La cuestión qué va hacer China con ese PIB, como lo reparte internamente y como lo gasta e invierte en otros países.

REASON: 145 According to my opinion, Chinese economy will be the world's largest in the stated period, maybe even before.

REASON: 146 Entiendo que hay unanimidad al pensar que eso será así. No obstante, cuando suceda supondrá un cambio de gran calado.

REASON: 147 Where? In China?

REASON: 148 It'll happen if China's leaders can keep ahead of internal dissent and unrest in Western China resulting from gerowing inequities between regions. And that has implications for businesses all over the world. Coops will be less affected because they are more local on average.

REASON: 149 I think with the cheapest labour China will attract many corporations and projects, which will cause the economy (GDP) of China to rocket. Meanwhile, Chine will be the largest holder of U.S. Dollar, which may give an opportunity to China to dominate to the global economy and markets.

REASON: 150 The implications of such an event, and its link to ideology, could have dire impacts on food security and availability of natural resources as can already be seen across Africa.

**Question: 18. The BRIC countries will continue to be the most interesting markets for Direct Foreign Investment in 2030. By 2030, the share of exports of the BRIC countries compared with world exports will be on a par with the European (EU 27) export share, of approximately 23%.**

*Los países BRIC seguirán siendo en 2030 los mercados más interesantes para la Inversión Directa Extranjera. La participación de las exportaciones de los países BRIC respecto a las exportaciones mundiales, estará a la par de la participación de las exportaciones europeas (EU 27) en 2030, suponiendo esta participación aproximadamente un 23%.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 151 Creo que habrá nuevos países en funciones de los actuales "BRICS" aunque no se precisarlos.

REASON: 152 This also now includes South Africa as the 5th country in BRICS. Based on the consumption of natural resources and economic growth in these countries, as well as a strong entrepreneurial spirit this is very probable.

REASON: 153 Seguramente, habrá otros nuevos Estados o grupos de países.

REASON: 154 Más que países BRIC hablaremos de EAGLES... o algún otro acrónimo similar. En todo caso el peso de los emergents está fuera de toda duda.

REASON: 155 Trends are already showing that some BRIC countries' growth is slowing while some emerging economies are accelerating and that trend could continue because of raw material and labor resources.

**Question: 19. Exports from India will grow by 13% per year until 2030, followed by China (7.1%), Brazil (6.5%) and Russia (4.9%).**

*Las exportaciones de India crecerán hasta 2030 en un 13% al año, seguido de China (7,1%), Brasil (6,5%) y Rusia (4,9%).*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 156 Almost no chance that these numbers will be met exactly. A lot can go wrong.

REASON: 157 Do not know why the question is important. What if each number is changed + or - by 1 percent. So What?

REASON: 158 No importa tanto el valor, pero qué costo social y medio ambiental tiene, dónde obtener las materias primas, cuál es el costo del transporte en dinero y medio ambiente, cómo repercute en la economía de otros países,....

REASON: 159 This question would have a lot more value if it addressed each country separately. The probability of meeting exactly these figures for all 4 countries would be quite low.



REASON: 160 Unless India's government leadership can get the bureaucracy out of businesses way, India will become too expensive to continue to be the exporter of choice. The implications for business is that if Indian exports do not continue to grow and drive improvements in GDP and per capita GDP, then many businesses around the world will be affected by reduced growth rates in India.

REASON: 161 Algunas empresas se verán fuera del mercado por los costos elevados, otras tendrán problemas de abastecimiento o encarecimiento. ¿Repercutirá negativamente en el empleo?

**Question: 20. Increase in purchasing power: The middle class in BRIC countries will grow by 150% from 800 million currently to 2000 million by 2030.**

*Incremento del poder adquisitivo: la clase media de los países BRIC crecerá en un 150%, de 800 millones de personas en la actualidad a 2.000 millones en 2030.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 162 Ese aumento del poder de compra supone un mejor reparto del PIB, en mi opinión ese incremento necesita un desarrollo político y participativo que no creo que las élites políticas y técnicas estén dispuestas a asumir en un corto periodo de tiempo. Digamos que hace falta una revolución burguesa y la creación de clase media también política.

REASON: 163 I am not convinced that simple growth in population implies an associated growth in purchasing power. There are a lot more factors that would impact on purchasing power of the middle class, such as employment, education, growth in GDP, exports/ imports and so on.

REASON: 164 Besides agreeing with a statement on the right side that a population growth may not be highly related to a growth in purchasing power, I would be attentive to an observed reduction of middle class in some transitional countries.

REASON: 165 Este es un factor clave del nuevo escenario. Además de incrementar la demanda exigirán cambios sociales en sus países.

REASON: 166 Unless there is a prolonged period of world peace and prosperity without major political swings that undermine investor confidence in the BRICs, then that growth rate is overly optimistic.

REASON: 167 A las empresas siempre les viene mal una revolución aunque sea burguesa y una transición democrática y participativa en el corto / medio plazo.

**Question: 21. "Next Eleven" Countries: Bangladesh, Egypt, Indonesia, Iran, Mexico, Nigeria, Pakistan, Philippines, South Korea, Turkey and Vietnam. Their real GDP will grow by 5.9% annually over the next 20 years, reaching 30% of the total GDP of the BRIC countries and 11% of world GDP.**

*Países “Next Eleven”:* Bangladesh, Egipto, Indonesia, Irán, México, Nigeria, Pakistán, Filipinas, Corea del Sur, Turquía y Vietnam. Tendrán un crecimiento del PIB real de un 5,9% anual en los próximos 20 años, alcanzando el 30% del PIB total de los países BRIC y el 11% del PIB mundial.

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

Fuente: ROLAND BERGER, “Trend Compendium 2030”

REASON: 168 What are the criteria for inclusion in this list of 11 countries? If political considerations have any weight, then several should be excluded. What about Chile, Ghana, Angola?

REASON: 169 No conozco el criterio de inclusión en la lista de esos y no otros países, pero Sudáfrica, Chile, Angola,... Mis reservas están en la posible estabilidad política interna y la geopolítica internacional. No olvidemos que son países de grandes riesgos en desastres naturales, terremotos, tsunamis, huracanes, inundaciones, sequías, escasez de agua corriente y fuerte riesgos de epidemias.

REASON: 170 Is this question about growth AND GDP? More accurate estimates could be obtained by breaking it into 2 questions.

REASON: 171 Political instability may cause problems in achieving those numbers.

REASON: 172 Pueden ser una fuerte amenaza en los sectores manufactureros, turísticos, centros de servicios y TIC.

**Question: 22. South Africa, Nigeria, Egypt and Angola will be the African countries with the highest growth. Africa will increase its world exports from the current 2.8% to 7.1% by 2030.**

*Sudáfrica, Nigeria, Egipto y Angola serán los países africanos que más crecerán. África incrementará sus exportaciones mundiales desde el 2,8% actual al 7,1% en 2030.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

Fuente: ROLAND BERGER, “Trend Compendium 2030”

REASON: 173 Depends on ability to eliminate or control corruption and avoid civil war

REASON: 174 Los riesgos políticos internos y externos son fuerte. Preveo mucha inestabilidad política en la próxima década. Las migraciones interafricanas y del campo a la ciudad serán muy conflictiva, casi seguro explosivas por las hambrunas y falta de agua y combustibles.

REASON: 175 It is not clear to me on what basis Angola is selected for this. What about Zambia or Uganda or Tanzania?

REASON: 176 Africa es la gran "tapada", y geoestrategicamente está muy cerca de la UE

**Question: 23. Africa's middle class will grow strongly to 2030, increasing by more than 110 million in the next 20 years, from the current 55 million to 180 million in 2030 (5% of the world's middle class).**

*La clase media de África crecerá con fuerza hacia 2030, creciendo en más de 110 millones de personas en los próximos 20 años, de los 55 millones actuales, a 180 en 2030 (5% del clase media global).*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 177 Creo en que en una década la llamada clase media va a ser laminada y se repartirán los bienes de forma desigual y concentrada. Y creo que será un fenómeno global, descenderá en unos países y en otros no surgirá según lo previsto.

REASON: 178 Creo que esto no es nada real.

REASON: 179 Podría favorecer a a empresas de bienes intermedios, maquinaria y de consumo.

**Question: 24. Without counting Brazil, Argentina will be the largest economy in South America in 2030, reaching a fifth of Brazil's GDP. The countries with the next highest growth in GDP will be Columbia, Chile and Venezuela. Global exports from South America will go from the current 5.6% to 6.3% in 2030.**

*Sin contar Brasil, Argentina será la economía más grande de Sudamérica en 2030, alcanzando una quinta parte del PIB de Brasil. Seguidamente, serán Colombia, Chile y Venezuela los países que mayor crecimiento del PIB tendrán. Las exportaciones mundiales de Sudamérica pasarán del 5,6% actuales al 6,3% en 2030.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"

*Fuente: ROLAND BERGER, "Trend Compendium 2030"*

REASON: 180 Mexico, Korea, Peru y Filipinas tendra un desarrollo elevado

REASON: 181 Veo muchos riesgos políticos y los modeos de crecimiento no me parecen sostenibles. La distribución de la riqueza seguirá siendo muy desigual. Riesgos de catástrofes naturales y ecológicas.

REASON: 182 La distribución de la riqueza seguirá siendo muy desigual, pero estos países crecerán fuertemente.

REASON: 183 El posicionamiento en Latinoamerica es estartégico para las empresas europeas. No obstante la Región no es un todo homogéneo.

REASON: 184 Posibilidades en exportar modelos de gestión, máquina herramienta y bienes y servicios intermedios. Serán destinatarios de inversiones y fábricas.

**Question: 25. Extra-financial factors: brands, technology, capacity for innovation, information systems, customer relationships, business culture values, image or reputation**

**will, like intellectual capital, contribute to the strengthening of companies and to the fundamental improvement of capabilities and competencies in the medium to long term. Consequently, it can be seen that the mission of managers must be to maximise expectations for value in the long-term, despite some short-term gain sacrifices.**

*Los factores extra-financieros, que como el capital-intelectual, las marcas, la tecnología, la capacidad de innovación, los sistemas de información, las relaciones con los clientes, los valores de la cultura empresarial, la imagen o la reputación, contribuyen al fortalecimiento de las empresas y a la mejora de sus capacidades y competencias fundamentalmente a medio y largo plazo. Consecuentemente, se observa que la misión de los gestores debe ser, maximizar las expectativas de valor en el largo plazo, aunque para ello deban sacrificarse las ganancias fáciles en el corto plazo.*

Detailed Question: Source: NORTHWESTERN UNIVERSITY'S KELLOGG SCHOOL OF MANAGEMENT, Alfred Rappaport

*Fuente: NORTHWESTERN UNIVERSITY'S KELLOGG SCHOOL OF MANAGEMENT, Alfred Rappaport*

REASON: 185 Profit will still be king, and the short term, unfortunately, will likely win out over the longer term

REASON: 186 Ese modelo olvida la responsabilidad social y ecológica de las empresas. Dudo que los clientes permitan esa fuga de responsabilidades.

REASON: 187 For any business, profit and the bottom line drives almost all decisions including the priorities of managers and unless foresight becomes an integrated organizational value, this won't change.

REASON: 188 I believe that stated extra-financial factors will have an increasing role when they are continuously developed and when their effects are monitored.

REASON: 189 No hay futuro sin presente, por lo que los sacrificios a corto plazo deberán de ser muy medidos.

REASON: 190 No descarto cierto marketing de las consultoras para la venta de sus servicios, pero lo básico de la empresa es el trabajador, el producto y el cliente. Este modelo pervivirá en la PYME.

**Question: 26. According to Forrester consultancy group, the mass customisation of the future will be more social, physical (technologies such as Microsoft XBOX Kinect, etc.), mobile, intimate (even more customised), integrated (greater change of products), based on platforms (shared technologies) and co-created (using customisation to create more significant solutions and standard products). These products will lead to unprecedented customer loyalty levels and will generate a strong product market differentiation.**

*Según la consultora Forrester, la personalización masiva o mass customization del futuro será más social, física (tecnologías como Microsoft XBOX Kinect,...), móvil, íntima (incluso más personalizada), integrada (mayor cambio de productos), basada en plataformas (tecnologías compartidas) y co-creada (utilizar la personalización para generar soluciones más*

*significativas y productos estándares). Estas ofertas llevarán a unos niveles de lealtad del cliente sin precedentes y generarán una potente diferenciación de mercado de los productos.*

Detailed Question: Source: FORRESTER, Mass Customization Is (Finally) The Future Of Products, 2011

*Fuente: FORRESTER, Mass Customization Is (Finally) The Future Of Products, 2011*

REASON: 191 I think the first sentence captures a likely trend. But the second sentence does not necessarily follow....I think customers will become increasingly sophisticated in their ability to keep testing market values for the products and services they want

REASON: 192 I think it is also possible to become socially "too interconnected" with special mental health problems. There is a possibility of reinforcing individuality and the protection of individual minds

REASON: 193 En la pregunta hay dos tendencias, en mi opinión divergentes la personalización masiva y la lealtad y la diferenciación. Es posible la personalización masiva (por encima 85%) pero la lealtad fija que no, cada vez costará más fijar al cliente. Paradojicamente, creo se producirá no diferenciación del producto, sólo la marca se diferenciará.

REASON: 194 I don't think that such products will lead to unprecedented customer loyalty levels. Would an increase in customization and choice not lead to customers changing product a lot easier?

REASON: 195 I believe that the customisation is a very likely future marketing approach, mainly due to an individualization trend, already seen in many segments of the society. It may be needed not only to enlarge customer loyalty levels, but also to start selling the products or services.

REASON: 196 Muchas empresa tendrán severos problemas de marca, y sus intentos de fidelizar desfiguraran al producto o a la marca.

**Question: 27. For 2020, global investment demand could reach maximum levels and consequently, the difference between capital demand and savings will probably increase real interest rates in the long term. For this reason, companies, financial institutions, consumers, investors and governments will have to adapt to a world in which capital is more expensive and less abundant, and where more than half of savings and investment is concentrated on emerging markets. This means that business models should evolve, investors should develop new strategies and governments could play a significant role in facilitating this transition.**

*Para 2020, la demanda global de inversión podría alcanzar niveles máximos y consecuentemente, la diferencia entre la demanda de capital y la oferta de ahorro, incrementará probablemente los tipos de interés reales a largo plazo. Por ello, las empresas, las instituciones financieras, los consumidores, los inversores y los gobiernos se tendrán que adaptar a un mundo en el que el capital es más caro y menos abundante, y donde más de la mitad del ahorro y la inversión se concentra en los mercados emergentes. Esto supone que los*

*modelos de negocio deberán evolucionar, los inversores deberán desarrollar nuevas estrategias y los gobiernos podrían jugar un papel importante en facilitar esta transición.*  
 Detailed Question: Source: MCKINSEY GLOBAL INSTITUTE, “Farewell to cheap capital? The implications of long-term shifts in global investment and saving”, 2010  
 Fuente: MCKINSEY GLOBAL INSTITUTE, “Farewell to cheap capital? The implications of long-term shifts in global investment and saving”, 2010

REASON: 197 Will be good for investors who need high rates of return on invested capital

REASON: 198 Creo que el dinero circulará vía fondos soberanos y bancos de bancos en países emergentes hacia las zona necesitadas de capital y no sera problema para 2020, quizás sí para 2030

REASON: 199 El capital seguirá siendo clave, y un recurso escaso que se moverá mucho más que en la actualidad.

REASON: 200 Due to the non-reliable relations, uprisings in many countries, risks of financial crisis, etc. governments and corporations do not prefer to invest in many parts of the world. With decreasing range of areas to invest global investment will be "bread & butter" for many developing countries. According to the government, I think governments are the worst investors, because they do not think long-term perspectives but concentrate on short-term forces. We can see its obvious results in many countries which struggle with financial crisis like Greece.

REASON: 201 Si se cumple habrá problemas con los prestamos e inversiones.

**Question: 28. In the 2020s economic system, productive entrepreneurship will be acknowledged and supported. It will be encouraged by a policy of stricter competition that will better serve growth through innovation rather than by mergers and acquisitions. Institutional structures will be established to provide long-term finance for companies that enter new areas such as those of the low carbon economy, to improve the use of existing technologies or transform cultural and creative value into new commercially exploitable products and services, including investments in brand value.**

*En la economía de 2020, el emprendizaje productivo será reconocido y apoyado. Será animado por una política de competencia más estricta que pasa más por el crecimiento a través de la innovación que por el camino de las fusiones y adquisiciones. Se establecerán estructuras institucionales para proporcionar financiación a largo plazo para empresas que se introduzcan en nuevas áreas como las de la economía baja en carbono, mejorar el uso de tecnologías existentes, o transformar el valor cultural y creativo en nuevos productos y servicios comercialmente explotables, incluyendo las inversiones en el valor de marca.*

Detailed Question: Source: WORK FOUNDATION (LANCASTER UNIVERSITY), “Innovation, Creativity and Entrepreneurship in 2020” (<http://www.theworkfoundation.com>)  
 Fuente: WORK FOUNDATION (LANCASTER UNIVERSITY), “Innovation, Creativity and Entrepreneurship in 2020” (<http://www.theworkfoundation.com>)

REASON: 202 I think that it is as likely to proceed towards social entrepreneurship as focusing on growth, I don't take growth-driven policy as self-evident

REASON: 203 Dudo que se cumpla el supuesto en 2020.

REASON: 204 I support an approach related to an importance of innovations, at least when I apply it to the pharmaceutical industry. A recent lack of innovative medicines leads to reduced therapeutic benefits. Common efforts for enlarging the care for the health of the population, rather than promoting short economic benefits, would lead to long-term benefits.

**Question: 29. The concept of non-ownership will emerge, as distinct from private ownership or state ownership. An example of this is open source software.**

*Surgirá la figura de la no-propiedad, como diferenciada de la propiedad privada o la propiedad estatal. Un ejemplo de ello es el software libre.*

Detailed Question: Source: MILLENNIUM Project, "State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System"

*Fuente: Proyecto MILLENNIUM, "State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System"*

REASON: 205 We're there already

REASON: 206 Everything belongs to someone or some 'thing'. Like 'cooperative', "non-ownership" however the delphi writer sees the term, is fungible in the absence of a definition. A cooperative in my country is very very different to one in the neighbour, and, in both countries the sub-jurisdictions impose uniquenesses,

REASON: 207 No creo que surga la "NO PROPIEDAD" más bien creo en la copropiedad, el uso compartido, creación colaborativa, licencias de libre uso...

REASON: 208 La no-propiedad, o co-propiedad... o algo similar... obligará a cambios significativos en los Modelos de Negocio de las empresas.

REASON: 209 Se necesita una competencia colaborativa, cocrear conocimiento y tecnología. Invertir de forma cooperativa.

REASON: 210 I think, non-ownership belongs to some intangible things, as internet. But when we review tangible and many intangible products we can see that copyright is becoming valid and penalties due to plagiarism and piracy growing rapidly. That is why, I don't think that non-ownership will be very famous.

**Question: 30. Self employment via Internet - individuals seek markets for their abilities rather than jobs. New simpler methods will be developed so that individuals can invest directly in start-up companies and in research.**

*El auto-empleo vía Internet – los individuos buscan mercados para sus competencias en lugar de empleos. Se desarrollan nuevas formas más simples para que los individuos puedan invertir directamente en compañías start-up y en investigación.*

Detailed Question: Source: MILLENNIUM Project, “State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System”

*Fuente: Proyecto MILLENNIUM, “State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System”*

REASON: 211 May happen but big corporations will still rule the day

REASON: 212 No será numéricamente representativo sobre el total de población del mundo, aunque cabe la posibilidad de la importancia cualitativa.

**Question: 31. India will continue to maintain its world leadership in Information Technology Business Process Outsourcing (IT-BPO), the Indian market increasing from 71,600 million dollars in 2009 to 285,000 millions of dollars in 2020, with an annual growth of 15% approximately.**

*India seguirá manteniendo su liderazgo mundial en el Outsourcing de Procesos de Tecnologías de la Información (IT-BPO), pasando el mercado indio de los 71.600 millones de dólares en 2009 a 285.000 millones de dólares en 2020, con un crecimiento anual del 15% aproximadamente.*

Detailed Question: Source: KPMG, ASOCIO, “Asia-Oceania Vision 2020: Enabling IT leadership through Collaboration”

*Fuente: KPMG, ASOCIO, “Asia-Oceania Vision 2020: Enabling IT leadership through Collaboration”*

REASON: 213 There will be a great effort to call jobs back to the country of origin as long as global unemployment is high. Additionally, no country holds a lead of this sort forever- there will be less expensive and talented labor elsewhere.

REASON: 214 I have lived in India for several years and continue to take an active interest in this country. The benefits of Indian maintaining its world leadership in IT-BPO, will not necessarily be realised by the thousands of workers in this sector.....For India to remain competitive, their standard of living may not rise much

REASON: 215 Hay varios países que le harán competencia.

REASON: 216 El posicionamiento de India será hegemónico, aunque no único en ese ámbito.

**Question: 32. Another option will be to outsource innovation to other network business partners, thus distributing the value of the innovation along the value chain, thus reducing the cost to the companies.**

*Otra opción será la de externalizar la innovación a otros socios empresariales que trabajan en red, distribuyendo así el valor de la innovación a lo largo de la cadena de valor, reduciendo así las empresas el coste que supone.*

Detailed Question: Source: KPMG, ASOCIO, “Asia-Oceania Vision 2020: Enabling IT leadership through Collaboration”



*Fuente: KPMG, ASOCIO, "Asia-Oceania Vision 2020: Enabling IT leadership through Collaboration"*

REASON: 217 In some places and circumstances.

REASON: 218 If one outsources (the task of?) 'innovation', surely it becomes their innovation not yours.

REASON: 219 Externalizar la innovación es la versión moderna y de pago del "que inventen ellos". Lo considero de alto riesgo.

REASON: 220 I find outsourcing innovation beneficial for the development when it is legally supported and accepted by the involved parties.

REASON: 221 Los procesos de "open innovation" irán a más, y serán una de las ventajas competitivas de los países desarrollados

REASON: 222 Las empresas serían rehenes de los derechos registrados y las patentes.

**Question: 33. Thus, it is predicted that in 2020 polarisation between large multinationals and small business projects developed over a network will take place:**

- On the one hand, there will be a market dominated by multinationals that will be increasingly large and influential and will have a budget larger than many countries.
- On the other, organisations will have smaller and less hierarchical structures made up of networked professionals working on projects and in different countries. Many of these professionals will not even form part of the organisations, but will be grouped together in collaborative networks and offer services and products of high added value to those multinationals.

**In both cases, the companies will be more flexible, diverse and dynamic.**

*Así, se prevé que en 2020 se producirá una polarización entre grandes multinacionales y pequeños proyectos empresariales desarrollados en red:*

*- De un lado, habrá un mercado copado por multinacionales que cada vez serán más grandes e influyentes y que dispondrán de un presupuesto superior al de muchos países.*

*- Por otro, las organizaciones contarán con estructuras más pequeñas y menos jerárquicas, compuestas por profesionales que trabajarán en red, por proyectos y en diferentes países.*

*Muchos de estos profesionales incluso no formarán parte de organizaciones, sino que se agruparán en redes colaborativas y ofrecerán servicios y productos de alto valor agregado a aquellas multinacionales.*

*En ambos casos se tratará de compañías más flexibles, diversas y dinámicas.*

Detailed Question: Source: ROLAND BERGER, "Trend Compendium 2030"; ESADE; PRICE WATERHOUSE COOPERS.

*Fuente: ROLAND BERGER, "Trend Compendium 2030"; ESADE; PRICE WATERHOUSE COOPERS.*

REASON: 223 I give it low probability because there are too many parts to this forecast and thus some parts may be true but others not.

REASON: 224 El proceso ya está en marcha y será irreversible.

REASON: 225 Esto es seguro ya que en la actualidad se está produciendo. El resultado afectará en gran medida.

REASON: 226 I think that at least partly a polarisation already takes place, meaning powerful large companies and flexible smaller companies with an advantage of quick adjusting to changing circumstances. However, their mutual cooperation often has to be established.

REASON: 227 No creo que la polarización sea tan grande. Surgirán nuevas realidades intermedias; híbridos entre las multinacionales y los pequeños proyectos, que tengan características de ambos.

REASON: 228 Si tardan en montar o incorporarse a las redes o a integrarse de alguna manera, en pocos años tendrán una travesía del desierto muy dolorosa y me temo que con destino a la extinción.

REASON: 229 Actually, big corporations and multinationals are very important in market-oriented economy because they are great investor and investigator, they encourage economy growth and also hire many people. According to the small professionals, they are also important with high flexibility and elasticity for struggling with rapid changes in innovative areas.

REASON: 230 Las empresas han de seguir este camino si quieren subsistir.

**Question: 34. In the case of the banks, after the financial crisis, the increased focus on international governance, the stress test analysis of scenarios, liquidity and capital adequacy, should result in the value of governance functions, risks and compliance being more apparent.**

*En el caso de la banca, tras la crisis financiera, el mayor enfoque hacia la gobernanza internacional, los test de estrés, los análisis de escenarios, la liquidez y la adecuación de capital, debería suponer que el valor de las funciones de la gobernanza, riesgos y conformidad deberían ser más aparentes.*

Detailed Question: Source: PRICE WATERHOUSE COOPERS, "The future of Banking", 2009  
Fuente: PRICE WATERHOUSE COOPERS, "The future of Banking", 2009

REASON: 231 Pipe dream. We are already seeing complacency replacing crisis, and, the financial/economic/political saga of Europe/the EU is a very clear message

REASON: 232 Sería lo deseable, pero difícil de conseguir. De hecho los movimientos que se han producido en la Banca tras los "brotos verdes" que se han visto en algunas economías indican que su actuación será muy diferente.

**Question: 35. With a view to the "Europe 2020" strategy, the introduction of employee financial participation may help companies in Europe, in particular SMEs, to improve**

**their competitiveness as it increases identification with them and links with their qualified workers - both in good and bad times. Thus, the employees' financial participation can also contribute to ensuring a sustainable future.**

*Con vistas a la estrategia "Europa 2020", la introducción de la participación financiera de los trabajadores puede ayudar a las empresas en Europa, en particular también a las PYME, a mejorar su competitividad, ya que aumenta la identificación con ellas y la vinculación de sus trabajadores cualificados –tanto en los buenos como en los malos tiempos–. Así, la participación financiera de los trabajadores también contribuirá a garantizar un futuro sostenible.*

Detailed Question: Source: EUROPEAN ECONOMIC AND SOCIAL COMMITTEE, Report on "Employee Financial Participation in Europe", 2010.

*Fuente: COMITÉ ECONÓMICO Y SOCIAL EUROPEO, Dictamen sobre el tema "Participación financiera de los trabajadores en Europa", 2010.*

REASON: 233 el conocimiento y la innovación residen en las personas que cuanto más se integren en el proyecto empresarial, mayor será su contribución. La sociedad reclamará crecientemente la participación en los resultados y la gestión de la empresa, pero igualmente será necesario aceptar avanzar en la participación en capital de TODOS los miembros de la empresa

REASON: 234 La participación de los trabajadores en el capital de una empresa solo garantiza un vínculo financiero, es necesaria una participación efectiva de trabajador y del trabajador-accionista en la empresa. Los modelos de empresa basados en acciones son muy poco democráticos y poco transparentes. Creo necesario cambios en los modelos de gestión.

REASON: 235 Esto es muy positivo porque siempre la participación redundará en una mayor integración y motivación, acrecentando los niveles de productividad.

REASON: 236 La participación de los trabajadores directamente, así como por medio de las EPSV-Planes de Pensiones... será una palanca estratégica de motivación-integración y de diferenciación.

REASON: 237 El impacto en la gestión podría ser muy grande acercando las empresas tradicionales a modelos de economía social.

**Question: 36. According to the "Al(l)one" Scenario of the report "Worker Participation 2030. Four scenarios", the 2020 decade will see a development in the concept of cooperatives as organisations made up of various groups to achieve their specific common objectives, in fields such as energy, health, mobility and the financial sector for supporting local projects. In this context, to seek the size of company appropriate to the organisation's objectives instead of growth as an end in itself, it will limit the risk of losing direction and entering a spiral of "more growth or die".**

*Según el Escenario "Al(l)one" del informe "Worker Participation 2030. Four scenarios", la década de 2020 observará un desarrollo de la figura de las cooperativas, como organizaciones constituidas por diversos grupos para alcanzar sus objetivos específicos comunes, en ámbitos como la energía, la salud, la movilidad y el sector financiero de apoyo a proyectos locales. En*

*este contexto, buscar el tamaño de empresa adecuado a los objetivos de la organización en lugar de crecer como fin en sí mismo, limitará el riesgo de perder el rumbo y entrar en una espiral de “crecer más o morir”.*

Detailed Question: Source: ETUI / IPA, “Worker Participation 2030. Four scenarios”

*Fuente: ETUI / IPA, “Worker Participation 2030. Four scenarios”*

REASON: 238 I agree cooperatives will grow, but this question is much too complicated to give a single probability answer.

REASON: 239 La optimización de la intercooperación es fundamental para conseguir la dimensión adecuada de las cooperativas para ser competitivas en el contexto global

REASON: 240 El tamaño siempre es un riesgo en una empresa, en las cooperativas es crítico, pueden generarse crisis del propio modelo. También es un riesgo en los modelos cooperativos, las cooperativas propietarias de sociedades anónimas. Algunos verán ese riesgo como una oportunidad o un reto, pero creo que a largo plazo la convivencia de un modelo dual es insostenible.

REASON: 241 Entiendo que el "tamaño de empresa adecuado" es necesario siempre y para todo tipo de empresas. Las cooperativas no han de ser, por sistema, más pequeña que las "no cooperativas". Hay que avanzar en los modelos de gobernanza de las cooperativas. No se pueden gestionar como en épocas pasadas.

**Question: 37. Management by understanding is developed as distinct from by objectives or authority, so that each employee has an understanding of the whole organisation, making decisions in a fast changing environment.**

*Se desarrolla la gestión por comprensión como diferenciada de la gestión por objetivos o autoridad, de manera que cada empleado tiene la idea del conjunto de la organización, tomando decisiones en un entorno de cambio rápido.*

Detailed Question: Source: MILLENNIUM Project, “State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System”

*Fuente: Proyecto MILLENNIUM, “State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System”*

REASON: 242 sure, in some organizations, particularly start ups, but certainly not all and not likely for large established corporations.

REASON: 243 In a company of one or a few, maybe, but beyond a pipe dream in an organization such as Ford, or Boeing, or Raytheon

REASON: 244 This might first sound as a desired future, but I think that it would not be a place where we want to be, I don't think a healthy human mind could stand for understanding the wholeness in an ideal way without any unexpected negative implications

REASON: 245 Me temo que modelo piramidal tiene cuerda para rato sobre todo en la PYME más tradicional.

REASON: 246 No lo veo factible.

REASON: 247 It is a very nice concept, but only realistic in the companies where human capital is appreciated.

REASON: 248 Es lo deseable, pero no se deberá de confundir con llegar a consensos en las empresas. Ello mataría la estrategia.

REASON: 249 Sería revolucionario.

REASON: 250 "To understand the goal of the organization and to do your best for that" sounds great. But what about the employee who needs to earn more and more but not understand the goal? It will cause a problem, I think.

**Question: 38. According to the "Global Interest" Scenario for 2018, an effective globalised response to global challenges leads to an increase in resource productivity and low carbon growth. Successful companies have integrated sustainability management throughout the organisation. Corporate Social Responsibility (CSR) departments belong to the past.**

*De acuerdo al escenario "Global Interest" para 2018, una respuesta efectiva globalizada a los desafíos globales provoca un aumento de la productividad de los recursos y un crecimiento bajo en carbono. Las compañías exitosas han integrado la gestión de la sostenibilidad en toda la organización. Los departamentos de Responsabilidad Social Empresarial (RSE) son algo del pasado.*

Detailed Question: Source: CAP GEMINI / Forum for the Future, "Acting now for a positive 2018, preparing for radical change, the next decade of business and sustainability", 2008

*Fuente: CAP GEMINI / Forum for the Future, "Acting now for a positive 2018, preparing for radical change, the next decade of business and sustainability", 2008*

REASON: 251 El modelo de la Responsabilidad social ha fracasado completamente. Las empresas americanas no integran su gestión en las empresas europeas, ni las europeas lo hacen en sus empresas de países BRIC o países emergentes. Ha quedado reducido a planes acción social visualizados fuertemente en la comunicación corporativa. El futuro pasa por desarrollar, implementar y avanzar en la sostenibilidad de las empresas

REASON: 252 In the mining and extraction industries, CSR (which may in the future include CS Reciprocity) are growth 'industries', "or else". There was no stronger message at the just completed PDAC conference in Toronto (which representatives from every/every big and international mining company attended)

REASON: 253 Tal como veo la evolución de extracción de gases no convencionales y petróleo me parece imposible. habrá que ver la evolución política en Oriente Medio en el próximo lustro.

REASON: 254 La acción se centra en planes acción social únicamente y el fracaso ha quedado demostrado en alto grado.

REASON: 255 I think that CSR departments will still partly keep their purpose.

REASON: 256 Harán algo como reducción de costos simplemente.

**Question: 39. The rise of a new middle class in emerging economies will lead to unprecedented shifts in the consumer of 2020, such as relatively small and discounted purchases. Climate change, sustainability and the purchase of healthy products of natural origin will increasingly become topics of interest for consumers all over the world. As regards developments in technology, the implications of the method of attracting consumers to adopt or purchase products will be increasingly clear, in view of the increased information to which they have access.**

*El surgimiento de una nueva clase media en las economías emergentes provocará cambios sin precedente en el consumidor del año 2020, como compras relativamente pequeñas y por descuentos. El cambio climático, la sostenibilidad y la compra de productos saludables y de origen natural, cada vez más se convertirán en temas de interés de los consumidores de todas partes del mundo. En cuanto al desarrollo tecnológico, serán cada vez más notorias las repercusiones en la forma de atraer a los consumidores en la adopción o adquisición de productos, ante la mayor información a la que tienen acceso.*

Detailed Question: Source: DELOITTE, Consumer 2020, 2011

Fuente: DELOITTE, El consumidor en 2020, 2011

REASON: 257 I agree there are big changes in store here, but it is more likely that the marketers use new technology to sell to consumers who purchase whether or not their health or the environment is improved. Examples: signs that recognize the consumer and change their pitch accordingly.

REASON: 258 El desarrollo de nuevas clases medias lo veo claro, el problema es el consumo. La mayoría de los electrodomésticos, incluidos los más pequeños requieren electricidad, muchos de ellos agua, desagües, etc.. es decir una infraestructura complicada en mucho países o mega ciudades.

REASON: 259 Quizás 2020 es un poco pronto. Dies años más tarde, muy probable.

REASON: 260 Necesitarán nuevos productos, o más eficientes.

**Question: 40. As global knowledge connectivity and generation increases, companies need to establish a system that combines knowledge from different areas in an efficient, up-to-date network. Openness to the knowledge of others, knowledge sharing and common knowledge creation will become key targets for enterprises. For this, social networks, semantic web technologies and open innovations will play an important role, Web 2.0 will advance to Web 3.0.**

*A medida que se incrementa la generación de conocimiento y la conectividad, las empresas necesitan establecer un sistema en red que combine el conocimiento de diversas y diferentes áreas de una manera eficiente y actualizada. La apertura al conocimiento de otros, el compartir el conocimiento y la creación de conocimientos comunes se convertirán en objetivos*

*primordiales para las organizaciones. Por ello, la proliferación de las redes sociales, las tecnologías web semánticas y las innovaciones abiertas (“open innovations”), pasando de la Web 2.0 a la Web 3.0.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

Fuente: ROLAND BERGER, *Trend Compendium 2030*

REASON: 261 El desarrollo de la empresa en red y la implementación de la sociedad del conocimiento es una realidad hoy día que tiende a potenciarse cada vez más.

REASON: 262 I find an interdisciplinarity essential for the future development.

**Question: 41. According to the “Factories of the Future” initiative, the focus of European industrial production to 2020 will be intelligent sustainable production, based on high performance ICTs based on the use of new materials.**

*De acuerdo con la iniciativa “Factories of the Future”, el enfoque de la producción industrial europea a 2020 será la producción sostenible, inteligente basada en TICs, de alto rendimiento y basada en la utilización de nuevos materiales.*

Detailed Question: Source: EUROPEAN COMMISSION, DG Research, “Factories of the Future PPP”, 2010

Fuente: EUROPEAN COMMISSION, DG Research, *“Factories of the future PPP”, 2010*

REASON: 263 La PYME seguirá usando baja tecnologías y habrá millones de trabajadores en ellas.

REASON: 264 Sería deseable, pero dudo que sea una realidad en 2020.

REASON: 265 Aunque estas nuevas tecnologías y materiales se implantarán sólo en un porcentaje reducido (2020) obligarán a una recomposición de las empresas tradicionales.

**Question: 42. According to the report “The Future of Corporate Innovation”, the centralised R&D models will be replaced by open innovation structures. The vision for the Innovation Network: Simple, transparent, instantaneous and with global access to globally distributed R&D resources and services.**

*Según el informe “The Future of Corporate Innovation”, los modelos de I+D centralizados serán sustituidos por estructuras de innovación abierta. La visión sobre la Red de Innovación: Simple, transparente, instantánea y con acceso mundial a recursos y servicios de I+D globalmente distribuidos.*

Detailed Question: Source: Z-PUNKT, “The Future of Corporate Innovation”, 2005

Fuente: Z-PUNKT, *“The Future of Corporate Innovation”, 2005*

REASON: 266 Es posible que sobre valore la posibilidad por el fuerte deseo personal de que suceda.

REASON: 267 An open access to the innovations is preferred, rather than the innovations which are too long protected by the patents and are therefore monopolistic.

**Question: 43. By 2030, the economically active population will have grown by 21% compared to 2010. Developing countries will grow by 931 million workers, equivalent to 24%. However, in developed countries it will be reduce by one million, mainly due to the ageing of their societies.**

*En 2030, la población económicamente activa crecerá un 21 por ciento respecto a 2010. Los países en vías de desarrollo tendrán un crecimiento de 931 millones de trabajadores, equivalente a 24 por ciento. Sin embargo, en países desarrollados disminuirá un millón principalmente por el envejecimiento de sus sociedades.*

Detailed Question: Source: HAYS – OXFORD ECONOMICS

Fuente: HAYS – OXFORD ECONOMICS

REASON: 268 Pongo en duda toda la estadística demográfica de más de la mitad del globo, y de los registro de edad. También hay fuertes dudas sobre los movimientos migratorios al incrementarse la inmigración y legal disminuir la legal.

**Question: 44. Occupations requiring highly and poorly skilled workers in the job market will increase in terms of jobs and salaries but the number of semi-skilled workers will decrease, leaving rich countries with an hourglass economy.**

*Las ocupaciones altamente cualificadas o poco cualificadas en el mercado laboral, aumentarán en términos de empleos y salarios pero disminuirán los trabajadores semi-cualificados, dejando a los países ricos con una economía de reloj de arena.*

Detailed Question: Source: HAYS – OXFORD ECONOMICS

Fuente: HAYS – OXFORD ECONOMICS

REASON: 269 I have no idea what to write. A highly-skilled worked in my country, may or may not be similarly designated elsewhere, but unskilled and semi-skilled have as many defintions as there are countries

REASON: 270 La polarización en el mercado laboral parece evidente, lo cual si no se gestiona adecuadamente conllevará serios problemas sociales.

**Question: 46. In the spirit of conciliation, the concept of "Flexi-time" will be extended into the future, so that work may start and finish at any time.**

*En sentido de la conciliación, el concepto de "flexi-time" estará extendido en el futuro, de manera que el trabajo pueda empezar y terminar a cualquier hora.*

Detailed Question: Conciliation is a set of social, institutional and business actions, whose aim is the development of a more egalitarian and just society. It is a way of organising the work environment to help men and women carry out their work and meet their personal and family responsibilities (co-responsibility). A sensitive attitude of organisations towards conciliation entails the development of a new organisational culture (new values): flexi-time, reduced working day, compressed working time, teleworking, nursery schools, development of services for care of dependants, awareness of values, etc. Source: ROLAND BERGER, "Trend Compendium 2030"; Source: MILLENNIUM Project, "State of the Future 2011. Chapter 4.2:



**Some Elements of the Next Global Economic System”**

*La conciliación es un conjunto de acciones sociales, institucionales y empresariales cuyo objetivo es el desarrollo de una sociedad más igualitaria y justa. Es un modo de organizar el entorno laboral que facilita a hombres y mujeres la realización del trabajo y de sus responsabilidades personales y familiares (corresponsabilidad). Una actitud sensible de las organizaciones hacia la conciliación supone el desarrollo de una nueva cultura de organización (nuevos valores): horario flexible, jornadas reducidas, jornadas comprimidas, teletrabajo, escuelas infantiles, desarrollo de servicios para el cuidado de las personas dependientes, sensibilización en valores, etc. Fuente: ROLAND BERGER, Trend Compendium 2030; Fuente: Proyecto MILLENNIUM, “State of the Future 2011. Chapter 4.2: Some Elements of the Next Global Economic System”*

REASON: 271 No en la PYMES que son la mayoría.

REASON: 272 No creo que esto se puede llegar a imponer a nivel general.

REASON: 273 'Flexi-time' may largely take place in the future, however it is not possible in the areas where working process doesn't allow it.

REASON: 274 La economía será mucho más flexible, pero no tengo claro que eso signifique una mejora en la conciliación.

**Question: 47. The economic valuation of a job continues to change to a more subjective perception of the post, with a demand for conditions that take diversity into account as well as measures that help to achieve a better balance in all aspects of life.**

*La valoración económica del empleo va cambiando hacia una percepción más subjetiva del puesto, demandando unas condiciones que tengan en cuenta la diversidad y unas medidas que ayuden a un mejor equilibrio de todos los aspectos de la vida.*

Detailed Question: When seeking or changing jobs, more and more people are positively assessing the added value the company can offer them in terms of an improvement in their quality of life. At a global level, women represent 40% of the total job market, a percentage that will increase by 2030. Between 1998 and 2008, the employment rate of women increased by 1%. Source: ROLAND BERGER, “Trend Compendium 2030”

*Cada vez son más las personas que evalúan positivamente, a la hora de buscar o cambiar de trabajo, el valor añadido que les puede ofrecer la empresa en lo referente a mejorar su calidad de vida. A nivel mundial las mujeres representan el 40% del total del mercado laboral, porcentaje que se incrementará en 2030. Así entre 1998 y 2008 el porcentaje de ocupación femenina mundial se incremento en un 1%. Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 275 La mayoría de las empresas usa a sus trabajadores bajo un mando jerárquico sujeto a procesos homogéneos y con el fin de obtener beneficios a bajo costo. El trabajador sigue siendo parecido al de "Tiempos modernos" de Chaplin.

REASON: 276 El criterio de jerarquía seguira siendo una realidad.

REASON: 277 Again a nice concept, however not often realized in the companies I observed.

REASON: 278 Entiendo que la valoración económica seguirá siendo clave, aunque habrá otras demandas que en función de la coyuntura se valorarán más o menos.

**Question: 48. In two decades time there will be more equality between men and women. The differences between men and women as regards primary education will be nearly non-existent by 2030. As of secondary education, the difference will decrease considerably, to 48% of men and 40% of women.**

*En dos décadas habrá más igualdad entre hombres y mujeres. Las diferencias entre hombres y mujeres en cuanto a educación primaria serán casi inexistentes en 2030. En cuanto a la educación secundaria, la diferencia se disminuirá considerablemente, con un 48% de hombres y 40% de las mujeres.*

Detailed Question: In 2000, only 42% of men and 32% of women finished their secondary education. Source: ROLAND BERGER, "Trend Compendium 2030"

*En 2000, solo el 42% de los hombres y el 32% de las mujeres terminaban la educación secundaria. Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 279 Lamentablemente este siglo no desaparecerá la desigualdad de género en el trabajo, en los sueldos, en la conciliación, en los "techos/suelos de cristal", en la responsabilidad y el mando, en los procesos de selección, etc..

REASON: 280 I gave a low probability estimate because I believe that by 2030, women will have higher percent estimate than men in secondary education: 48% of men, 50% of women is more like it.

REASON: 281 La desigualdad por razones de género es evidente a me dida que vamos ascendiendo en nivel y responsabilidades. Se trata de un problema estructural generado por razones culturales y sociales que va a costar mucho eliminar, llegando a una situación de igualdad real y efectiva.

REASON: 282 It may be valid globally, however with large geographical deviations, in the areas where women are still underprivileged.

REASON: 283 I agree with this point but these numbers belong to global indicators. When we investigate region by region we will see that in many African and Asian countries there is also great diversity and inequality between men and women.

**Question: 49. The demographic drop in developed countries, the greater percentage of highly skilled women and the growth of the knowledge society will mean that organisations will attempt to attract a greater number of professional women.**

*De esta manera, el descenso demográfico en los países desarrollados, el mayor porcentaje de mujeres altamente cualificadas y el crecimiento de la sociedad del conocimiento provocará que las organizaciones potencien la atracción de un mayor número de mujeres profesionales.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 284 Entrarán como en la II Guerra Mundial, a tapar huecos, pero no por justicia ni inteligencia empresarial, su empleo estará supeditado a cualquier varón.

REASON: 285 Lo veo poco probable, el patriarcado está demasiado arraigado.

REASON: 286 The statement seems logical and highly probable.

**Question: 50. There are 240 million migrant workers in the world. It will be important, therefore, to maintain open borders to encourage the movement of qualified workers, and agreements will be defined to facilitate immigration, for example, through the creation of a code that regulates migrant flows at a global level. Furthermore, intercultural management within organisations will be another challenge that will enrich their knowledge and will acquire particular relevance in the interrelationships and/or conflicts between workers with other cultures and societies different to those of the country of origin, and it will go beyond the vision of a work approach from the perspective of a single culture to a multicultural vision as demanded by a increasingly competitive market.**

*Existen más de 240 millones de trabajadores migrantes en el mundo. Será importante por tanto mantener las fronteras abiertas para favorecer el movimiento del trabajo cualificado y se definirán acuerdos para facilitar la inmigración, por ejemplo, a través de la creación de un código que regule los flujos migratorios en el ámbito mundial. Por otro lado, la gestión de la interculturalidad en las organizaciones será otro reto que enriquecerá el conocimiento de las mismas y adquirirán gran relevancia las interrelaciones y/o conflictos de los trabajadores con otras culturas y sociedades diferentes a las de origen y trascenderá la visión del enfoque de trabajo desde la perspectiva de una única cultura hacia una visión multicultural como exigencias de un mercado cada día más competitivo.*

Detailed Question: Source: HAYS – OXFORD ECONOMICS

*Fuente: HAYS – OXFORD ECONOMICS*

REASON: 287 La migraciones ilegales son un gran negocio que mueve cantidades ingentes de dinero, no creo que los flujos se regulen, no hay interés político ni económico en ello. La multiculturalidad esta bien para dar color a la cultura empresarial. En realidad se prefiere a personas del mismo clan o tribu, pero es poco profesiona reconocerlo.

REASON: 288 Creo que no tiene visos de realizarse, si bien habrá políticas que lo promuevan.

REASON: 289 Multicultural vision is quite fascinating but it will cause some problems for governments and increase population in one side of the world, decrease the population in another side.

**Question: 51. New generations such as the generation M (the Multimedia, Messenger, MySpace, Multitask, etc. generation), will create a new pace and new ways to perform in the work environment (multitasks, interactivity, new values, etc.), and it will be necessary**

to work on incentives to use the new technologies and networks at all levels, reducing the existing gap, especially with older workers. On the other hand, the aging of the active population in many of the most developed societies and the lack of a generational replacement leads to a scenario that we must address from the present with policies and programmes aimed at flexibility in work, continuous learning, transmission of knowledge and to non discrimination due to age in the job market (in the European Union, 64% of those surveyed thought that the economic crises would bring with it an increase in age discrimination in the job market).

*Las nuevas generaciones como la generación "M" (generación Multimedia, Messenger, MySpace, Multitarea..) marcarán nuevos ritmos y nuevas formas de actuar en el entorno laboral (multitareas, interactividad, nuevos valores,..) y será preciso trabajar en la incentivación del uso de las nuevas tecnologías y redes a todos los niveles, reduciendo la brecha existente, especialmente con los trabajadores de mayor edad. En el lado contrario, el envejecimiento de la población activa en muchos de las sociedades más desarrolladas y la falta de relevo generacional plantea un escenario con que tendremos que afrontar desde el presente con políticas y programas dirigidos a la flexibilidad en el trabajo, el aprendizaje permanente, la transmisión del conocimiento y a la no discriminación por edad en el mercado de trabajo (en la Unión Europea el 64% de los encuestados pensaba que la crisis económica conllevaría un aumento de la discriminación por edad en el mercado de trabajo).*

Detailed Question: Source: OIT, "Conditions of work and employment: Issues for older workers", 2008.

*Fuente: OIT, "Conditions of work and employment: Issues for older workers", 2008.*

REASON: 290 Las repercusiones de la generación "M" se notarán sólo en ciertas ocupaciones, y muchas empresas e bloqueara el acceso a esas maneras de hacer en función de un concepto obsoleto de la productividad.

REASON: 291 En la actualidad se da la paradoja que personas jóvenes muy cualificadas puedan quedar fuera o en los arrabales del mercado de trabajo y se obligue a personas mayores que están lejos de esas tecnologías a seguir en sus puestos. Hay que avanzar en un mejor reparto del trabajo y de la remuneración del mismo.

**Question: 52. Today, globally, life expectancy at birth is 68, which is expected to rise to 81 by 2100. Around 20% of the world's population will be over 60 in 2050, around 20% of Europeans are 60 or over compared with 10% in Asia and Latin America and 15% in Africa. More than 20 countries have decreasing populations which could increase to 44 in 2050, the majority of these in Europe. People will have a longer life and there will be more opportunities for telework, part time work and work rotation to reduce the economic load on the younger generations and to maintain standards of living.**

*Hoy la esperanza de vida al nacer es de 68 años a nivel mundial que se preve que crezca a 81 años a 2100. Alrededor del 20% del mundo tendrá más de 60 años en 2050, alrededor del 20% de los europeos tiene 60 ó más comparado con un 10% en Asia y América Latina y el 15% en África. Así más de 20 países tienen poblaciones decrecientes que podrían aumentar a 44 en 2050, la mayoría de ellas en Europa. La gente tendrá una vida más prolongada y creará más oportunidades de teletrabajo, trabajo a tiempo parcial y de rotación laboral para reducir la carga económica en las generaciones más jóvenes y para mantener los estándares de vida.*

REASON: 292 Es una forma de verlo, pero yo creo que la privatización y desmantelamiento del estado del bienestar obligará a los ancianos a trabajar hasta edades cercanas a la muerte para poder mantenerse.

REASON: 293 Habrá necesidad de aumentar las edades de jubilación.

**Question: 53. Companies will increasingly adopt a total compensation flexible scheme, like an "al la cart" menu, where the employees will have a mandatory basic benefits part and complete freedom to select, integrate and finance a flexible package of benefits that will respond very specifically to their needs and aspirations.**

*En el futuro las empresas harán énfasis cada vez más marcado en un esquema de compensación total, en el que los empleados tendrán libertad amplia y la responsabilidad para conformar y financiar su paquete de prestaciones. Probablemente, éste será como "un menú de opciones a la carta" en el que el empleado tendrá una parte obligatoria de prestaciones básicas, sobre todo de previsión de riesgos y gozará de libertad absoluta para seleccionar, integrar y financiarse un paquete de prestaciones que responda muy específicamente a sus necesidades y aspiraciones, derivadas de su situación familiar particular y de su estilo de vida. Además, esos planes de prestaciones probablemente serán muy flexibles, para responder a la diversidad de los empleados.*

Detailed Question: In the future, there will significant changes in total compensation packages for employees, including benefits. Globalisation of the economy, technological innovation and commercial integration will develop the capacity to create flexible conditions in all key aspects of the organisation. Thus, companies will put an increasingly marked emphasis on a total compensation scheme, in which employees will have broad freedom and responsibility to make up and finance their benefits package. Probably, this will be like an "al la carte options menu" where the employee will have a mandatory basic benefits part, particularly provision for work risk, and he or she will have complete freedom to select, integrate and finance a package of benefits that will respond very specifically to the needs and aspirations relating to his or her family situation and lifestyle. Furthermore, these benefit plans will probably be very flexible, to cover the diversity of employees. Source: MERCER

*En el futuro habrá cambios significativos en los paquetes de compensación total de los empleados, incluidas las prestaciones. La globalización de la economía, la innovación tecnológica y la integración comercial desarrolle la capacidad para crear condiciones de flexibilidad en todos los aspectos clave de la organización. Así, las empresas harán énfasis cada vez más marcado en un esquema de compensación total, en el que los empleados tendrán libertad amplia y la responsabilidad para conformar y financiar su paquete de prestaciones. Probablemente, éste será como "un menú de opciones a la carta" en el que el empleado tendrá una parte obligatoria de prestaciones básicas, sobre todo de previsión de riesgos y gozará de libertad absoluta para seleccionar, integrar y financiarse un paquete de prestaciones que responda muy específicamente a sus necesidades y aspiraciones, derivadas de su situación familiar particular y de su estilo de vida. Además, esos planes de prestaciones probablemente serán muy flexibles, para responder a la diversidad de los empleados. Fuente: MERCER*

REASON: 294 La desregulación y desaparición de los sistemas públicos de protección llevarán a ese sistema o a algo similar, pero producirá pobreza y sufrimiento entre las generaciones futuras.

**Question: 54. Organisations will develop strategies to attract talent focussed at a global level, beyond local and national borders. With the aim of attracting the best professionals, organisations will intensify their cooperation with universities. Furthermore, talent retention strategies will become key aspects for companies and organisations, with the aim of strengthening the workforce and work teams.**

*Las organizaciones desarrollarán estrategias de atracción del talento enfocadas a nivel mundial, más allá de las fronteras locales y nacionales. Con el objetivo de atraer a los y las mejores profesionales, las organizaciones intensificarán la cooperación con universidades. Asimismo, las estrategias de retención del talento se convertirán en aspectos clave para empresas y organizaciones, con el objetivo de fortalecer las plantillas y equipos de trabajo.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 295 Las estrategias de atracción de talento son la cara de la moneda. La cruz es la fuga/sustracción de talentos. Cómo influye en el desarrollo de los países la extracción de las élites formadas. ¿Porqué es más fácil encontrar médicos Africanos en NY que en África? ¿Qué hacemos con la ayuda al desarrollo?

REASON: 296 Las cooperativas tienen una gran oportunidad para atraer talento por identificación con los principios que les inspiran que es necesario dar a conocer.

REASON: 297 Talented people should be the core of development and international networks for discovering them and enabling their further advancement should be established.

REASON: 298 The use of Internet to advertise for jobs, internationally exists now and will get stronger

**Question: 55. For 2030, globalisation of the job market will lead to the migration of workers to places and countries with attractive job markets and societies with a good quality of life where "talent attraction" will be seen, while other countries will experience a "brain drain".**

*Para el año 2030, la globalización del mercado de trabajo dará lugar a una migración de trabajadores a lugares y países con mercados laborales atractivos y sociedades con una amplia calidad de vida donde se observará una “atracción de talento” mientras que otros países experimentarán una “fuga de cerebros”.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 299 Me parece imposible un sistema de migraciones tan amable, yo lo veo más cercano sistemas de vigilancia electrónica, vallas y deportaciones masivas. La valla entre México y EEUU, vigilancia en el sur de la península ibérica y Canarias, deportaciones París-Rumanía, suicidios de personal del servicio posteriores a su secuestro por "su amo",...

REASON: 300 Lo veo muy complicado que sea así dada la deriva de las políticas migratorias.

REASON: 301 I believe that a migration of talented workers will take place, although several factors, other than a better working opportunity, are usually considered before moving elsewhere. A 'brain drain' effect is often seen in the countries where a competence is not a major issue at employing or estimating working results.

REASON: 302 Entiendo que eso está ya sucediendo en la actualidad, a pesar de las barreras migratorias.

**Question: 56. Furthermore, recruitment of professionals will be carried out through social networks, a low-cost and good quality method that will also allow access to databases of professionals throughout the world.**

*Por otra parte, el reclutamiento de profesionales se realizará a través de las redes sociales, una vía de bajo coste y gran calidad que permitirá acceder además a bases de datos de profesionales de todo el mundo.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 303 Es un proceso que va en aumento, y como otros servicios (contratación de viajes, compra de seguros...) es muy probable que crezca vía internet y las redes sociales.

**Question: 57. The lack of talent will intensify both in developing and developed countries on the 2030 horizon; in developed countries the reason will be due to a reduction in the supply of professionals, while in developing countries it will be due to the increase in demand for professionals.**

*La falta de talento se intensificará tanto en los países en desarrollo como en los países desarrollados en el horizonte 2030; en los países desarrollados la razón será la reducción de la oferta de profesionales, mientras que en los países en desarrollo se deberá al incremento de demanda de profesionales.*

Detailed Question: Source: ROLAND BERGER, “Trend Compendium 2030”

*Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 304 Se creará otro concepto de talento, más basado en habilidades y competencias. Los técnicos especializados y los peones especialistas ampliarán sus ámbitos de actuación. Ya está sucediendo con los paramédicos y el personal de enfermería habilitado para diagnósticos y tratamientos.

REASON: 305 No creo que eso suceda ni en los países desarrollados ni en el resto. Dependerá de la coyuntura.

**Question: 58. Developed economies will lose an average 20,000 million Euros per country due to the lack of qualified professionals.**

*Las economías desarrolladas perderán como media 20.000 millones de Euros por país debido a la falta de profesionales cualificados.*

Detailed Question: According to a World Economic Forum report, the US will need another 26 million workers in its talent pool in 2030 to maintain the economic growth that it has experienced over the last 20 years, while Western Europe will need another 46 million additional workers. Germany will need 4.4 million professionals, of which half will be required in academic fields, especially research, consultancy, health, and education. Source: ROLAND BERGER, "Trend Compendium 2030"

*De acuerdo a un informe del World Economic Forum, EEUU necesitará añadir 26 millones de trabajadores nuevos a su pool de talento de cara al año 2030 para mantener el crecimiento económico vivido en los últimos 20 años, mientras que Europa Occidental necesitará otros 46 millones de trabajadores adicionales. Alemania tendrá una falta de 4.4 millones de profesionales, de los cuales la mitad serán requeridos en los campos académicos, especialmente en investigación, consultoría, salud, y educación. Fuente: ROLAND BERGER, Trend Compendium 2030*

REASON: 306 ¿ Cual es la pérdida de los otros países, que fueron saqueados en sus "recursos de conocimiento". Profundo economocentrismo.

REASON: 307 Have no idea what the reason for or importance of this question is. What if the figure was 25,000? So what?

REASON: 308 I think that developed economies will find ways to compensate the lack of qualified professionals and reduce losses (if any)

**Question: 60.Variable: There are co-operatives in all the world's countries, and it is estimated that 1000 million people are members of cooperatives.**

*Hay cooperativas en todos los países del mundo y se estima que 1.000 millones de personas son miembros de cooperativas.*

REASON: 309 cooperative are an form new companies. They are new type of bussines organisations in globalised world which are based on participatory decision-making in the management small company.

REASON: 310 El cooperativismo es una opción de futuro que se incrementará de manera significativa en los países emergentes, a medida que las clases medias vayan cogiendo fuerza.

REASON: 311 One of the more feasible ways to form new companies. Around the cooperative movement in small businesses is a solution to the crisis

**Question: 61.Variable: The 300 largest cooperative businesses at a global level in 2008 had a total operations volume of 1.1 billion dollars.**



*Las 300 empresas cooperativas más grandes a nivel mundial en 2008 tuvieron un volumen total de operaciones de 1,1 billones de dólares.*

REASON: 312 los valores de solidaridad, trabajo, comunidad, equipo..

REASON: 313 La solidaridad y trabajo en equipo.

**Question: 62.Variable: The majority of the 300 largest cooperatives in the world are in the developed economies of Germany, the United States, France, Japan, and the Low Countries.**

*La mayoría de las 300 cooperativas más grandes del mundo se encuentran en las economías desarrolladas de Alemania, los Estados Unidos, Francia, el Japón y los Países Bajos.*

REASON: 314 los retos mas importantes de las cooperativas son crear una base conceptual y de valores internacionalemnte aceptada y reconocida y formar directivos con valores que corresponden a las cooperativas

**Question: 63.Variable: Distribution by sectors of these 300 cooperatives is as follows: 30% in agriculture and food; 23% in the retail trade; 22% in insurance; and 19% in the banking sector.**

*La distribución por sectores de estas 300 cooperativas es la siguiente: 30% en agricultura y alimentación; 23% en comercio minorista; 22% en seguros; y 19% en el sector bancario.*

REASON: 315 agriculture & food: 25% retail: 25% insurance: 22% banking: 20% other -- S&T research & start-ups: 8%

REASON: 316 agriculture & food: 25% retail: 25% insurance: 22% banking: 28%

REASON: 317 No sé que debo de responder. Entiendo que en agricultura y servicios crecerán de manera significativa.

REASON: 318 agricultura 50% seguros 10% Bancos 70%

REASON: 319 agriculture: 40% banks: 10% the others diminish

REASON: 320 agriculture and food: 15% retail trade: 28% insurance: 28% banking: 29%

**Question: 64.Variable: In the US, more than 900 electrical supply cooperatives provide services to more than 42 million people in 47 states. This represents 42% of the electrical distribution lines and covers 75% of the country's territory.**

*En EEUU, más de 900 cooperativas de suministro eléctrico prestan servicios a más de 42 millones de personas en 47 estados. Esto representa el 42% de las líneas de distribución eléctrica y abarca el 75% del territorio del país.*

REASON: 321 Entiendo que lo más probable es que ese número crezca significativamente.

REASON: 322 Entiendo que lo más probable es que su importancia crezca significativamente.

REASON: 323 What is the question? Is it market share of cooperatives in New Zealand?

REASON: 324 Entiendo que lo más probable es que ese número crezca significativamente.

**Question: 67.Variable: In Brazil, cooperatives accounted for 37.2% of agricultural GDP and 5.4% of total GDP in 2009.**

*En Brasil corresponde a las cooperativas el 37,2% del PIB agrícola y el 5,4% del PIB total en 2009.*

REASON: 325 Entiendo que lo más probable es que ese número crezca significativamente.

**Question: 68.Variable: In 2009, the 8124 cooperatives in Columbia accounted for 4.96% of national GDP.**

*En 2009 correspondió a las 8.124 cooperativas de Colombia un 4,96% del PIB nacional.*

REASON: 326 Entiendo que lo más probable es que ese número crezca significativamente.

**Question: 69.Variable: In Kenya, the savings and loans cooperatives, the biggest in Africa, have assets of 2700 million dollars, which represents 31% of gross national savings.**

*En Kenya las cooperativas de ahorros y préstamos, las mayores de África, tienen activos de 2.700 millones de dólares, que representan el 31% de ahorro nacional bruto.*

REASON: 327 Entiendo que lo más probable es que ese número crezca significativamente.

**Question: 70.Variable: In Mauritius, the agricultural sector cooperatives represent more than 60% of national production in the food crop sector.**

*En Mauricio las cooperativas del sector agrícola representan más del 60% de la producción nacional en el sector de los cultivos alimentarios.*

REASON: 328 Entiendo que lo más probable es que ese número crezca significativamente.

**Question: 71.What other development(s) might impact future business organizations developments with impact on cooperatives?**

*¿Qué otros desarrollos podrían afectar los progresos de las organizaciones empresariales del futuro con impacto en las cooperativas?"*

REASON: 329 Creo que cualquier enfoque ético y de valores. Hay que reforzar los valores cooperativos en la cooperativas. Gestión democrática e igualdad de derechos. Responsabilidad social y compromiso con la sostenibilidad y los valores solidarios y el comercio justo.

REASON: 330 I think decreasing amount of corruption will surely impact future business organizations because corruption always makes "the root to become weak".

REASON: 331 The development of energy alternatives to oil, ie, photovoltaic, wind, tidal ... and of course the greater involvement of workers in production and profit of the company and reduced State involvement.

REASON: 332 Las cooperativas tienen una presencia importante en el paisaje económico. Los sectores de actividad en los que opera, el número de socios que tiene, los puestos de trabajo que crea y las cifras de los lujos de financieros que genera se mueven en la difuminada frontera entre su componente social y actividad económica de cuño tradicional. Pero el funcionamiento real de las relaciones capital y trabajo, los procesos de decisión, el ejercicio del poder real en sus empresas, difiere de modo radical, a pesar de pasar inadvertidos ante la opinión pública. La relación de estas empresas y su compromiso con la comunidad las dotan de un perfil propio y las diferencian de modo primordial del resto de empresas. Su orientación al mercado y la búsqueda de competitividad en los mercados globales la practican desde la búsqueda del equilibrio entre la eficiencia económica y los valores que las sustentan. Cuando el capitalismo pervierte las reglas de funcionamiento del mercado, genera desigualdades y exclusión, beneficiando únicamente a los propietarios del capital, las miradas se vuelven hacia otra forma de hacer empresa, otra forma de trabajar, de consumir, de acceder a los recursos financieros que el proyecto de vida de un ciudadano necesita en su vida.

REASON: 333 The stop on education progress.

REASON: 334 SECURITY (even including in the face of >>corruption>>and plutocracy, and kleptocracy, and autocracy, and....

REASON: 335 Regulation supporting cooperatives -- such as reduced bureaucracy and financial and employment security incentives -- for encouraging cooperation among self-employed and SMEs.

REASON: 336 The development of cooperatives may be an important driving force in increasing employment and reducing the migration of people, especially in developing countries with high

unemployment. In Russia, with the peak of cooperatives development in the 90s, it is fair to say that the following factors contribute to the emergence and development of cooperatives: - Availability of standard legal documents (Charter and others) required to set up and launch a cooperative without unnecessary bureaucratic delays; - Support from local authorities, protection against criminal elements, anti-racketeering, tax exemptions; - Good reason to arrange free short-term training courses for people who want to organize a cooperative. I think that a very effective way of creation and development of cooperatives in developing countries which lack skilled labor could be inviting relevant temporary managers to organize new cooperatives and lead them, or to serve as consultants in their formation. Local authorities or government agencies could take the responsibility for inviting such managers and their remuneration. Moreover, international humanitarian and nongovernmental organizations, possibly the United Nations, could claim some responsibility and partial cost of setting up the training courses and inviting the temporary managers to develop cooperatives in such countries. This could be in the form of humanitarian assistance as an example. An ancient proverb says: "If you want to feed a man full once - give him a fish. If you want to feed him full for the rest of his life - give him a fishing rod and teach him how to fish."

REASON: 337 A coordination of internal organization with external environment.

REASON: 338 lack of social responsibility and government awareness of the importance of cooperatives as an organizational form of business association of interested people with the aim of achieving a better life.

REASON: 339 La privatización impuesta y el poder de las entidades bancarias

**Question: 72. What other Variables should be considered when assessing the trends for cooperatives? *¿Qué otras Variables deben ser consideradas al determinar las tendencias para las cooperativas?***

REASON: 340 -international conflicts; -financial risks and struggling with them; -etc.

REASON: 341 Apply strictly Surplus Distribution in Proportion to the Operations: This principle called Howart, is the essence of cooperation is in the sense of affirmation and denial of service profit solidarity, noting the difference between cooperative associations and civil society and business. The surplus obtained, ie the difference between cost price and selling price, are distributed in proportion to transactions and not in proportion to capital invested. The higher spending, higher savings.

REASON: 342 Los desafíos que se presentan hoy al cooperativismo son de un calado y alcance que requiere revisar su acervo histórico, repensar los modos de hacer tradicionales, abordar los

retos que se le presentan y ofrecer respuestas positivas a las ilusiones y las expectativas de los ciudadanos contemporáneos.

REASON: 343 The organizational culture. The society must advance to a collective thought, but its difficult.

REASON: 344 No idea, but Questions 61 to 68 are so narrowly focused and so dependent on the interpretation of "best", I have no idea how to answer any of them, (And one of the questions is two questions)

REASON: 345 The Questionnaire uses quotations for the question. However, in some cases such quotations contain a few different propositions, and describe several various tendencies. A single answer to such polysemantic question and the probability estimate for the occurrence of a number of different events become incorrect. I think that in such cases, following a sophisticated quotation, it would be appropriate to formulate one specific question and let it be the one to be answered. The wording of the question "How large will be the impact for enterprises (cooperatives)?" is a little ambiguous, since the term "impact" may express both positive and negative effects. If one expert sees a strong positive effect, while another - a strong negative one, they can give the same numerical answer, but will have the opposite tendencies in mind. In this case, The Global Expert Studies gets a wrong answer. Therefore, I think that it would be more correct to word the question more clearly. This way for example: "How large will be the impact for the development of enterprises (cooperatives)?"

REASON: 346 corruption in cooperatives

REASON: 347 political situation

REASON: 348 Climate changes by regions and unforeseen natural disasters in the coming period.

REASON: 349 No se han tenido en cuenta a las cooperativas industriales del Pais Vasco en España.

### **General Comments offered at the end of the questionnaire:**

Very interesting study, but the survey is long and many of the variables presented are compounded in ways that it is sometimes difficult to respond as you may agree with one part, but not with other issues added on (e.g. the variable playing out in different ways in different ways).

I think it is better to have simple variables, and present other issues as developments which are mini-scenarios; these would invite a more qualitative response (comments). All the best!

El impacto para las cooperativas, sera igualemnet decisivo.

Too loooooong!

Many of the questions are too long, complex and multi-factorial. Providing a single "probability" figure in these cases is scientifically meaningless. Either break them down so that probabilities can be estimated for each factor, or leave them out. Currently, they reduce the credibility of the whole questionnaire (at least in the eyes of grumpy old men like me...;-).

Information about how long this will take to complete should be at the beginning.

This is an interesting topic, but the survey is unfortunately way too long. With surveys this long, it will be hard to get high-level feedback and replies. I'd suggest to next time do more work beforehand in terms of clustering and filtering out the crucial questions and then only posing a max of 15 questions in a survey.

Question 30 is not translated in Spanish. The translation into Spanish is mixed too much with English words. It is important to improve the link after submit this page, so it takes people back to the question where they were. The questions, hypothesis or statements are sometimes confusing.

## Appendix B. The Full Questionnaire and Backgrounder

### Future of Business Organisations Futuro de las Organizaciones Empresariales

Delphi on the Future of Business Organisations: Cooperativism and other Models  
Delphi Sobre el Futuro de las Organizaciones Empresariales: Cooperativismo y otros Modelos

Screenshot of the questionnaire:



**Global Expert Studies**  
Using Real Time Delphi

**Future of Business Organisations**  
**Futuro de las Organizaciones Empresariales**

**Delphi on the Future of Business Organisations: Cooperativism and other Models**  
**Delphi Sobre el Futuro de las Organizaciones Empresariales: Cooperativismo y otros Modelos**

To see a reference paper on this topic [click here](#) (use your browser's back arrow to return here)

Please answer the questions in the form below. When you return please enter as a returning participant AND use this email address: [millennium-project@igc.org](mailto:millennium-project@igc.org) AND this study code: **orgs**. This study is scheduled to close on 2012-05-15.

[By pass introduction](#)

This DELPHI study is being carried out within the framework of the International Year of Cooperatives 2012, as research that will stimulate debate and reflection on the future of business organisations in general and on cooperatives in particular, in order to be able to determine key factors for a future cooperative model. For each one of these variables, a series of hypotheses for the future have been formulated (to 2020-2030), these are used as the basis for the Delphi questionnaire presented below. When formulating the hypotheses, a documentary analysis was made of the main existing research and studies from sources relating to each one of the analysed variables, only hypotheses that were documented in those studies have been included, so avoiding untested hypotheses. This means that the hypotheses may be somewhat limited in some cases, given that the reliability of the sources has been prioritised over the exhaustiveness of its scope, although the participants have the chance to enrich these scopes by making contributions and points in the comments section provided for each question.

El presente estudio DELPHI se realiza en el marco del Año Internacional de las Cooperativas 2012, como una investigación que promueva el debate y la reflexión sobre el futuro de las organizaciones empresariales en general y sobre las cooperativas en particular, de cara a poder determinar los factores clave del modelo de las cooperativas del futuro. Para cada uno de esas variables, se han formulado una serie de hipótesis de futuro (a 2020-2030), que son la base del cuestionario Delphi a expertos que se presenta a continuación. A la hora de formular las hipótesis, se ha realizado un análisis documental de las principales investigaciones y estudios existentes de fuentes relevantes en cada una de las variables analizadas, de manera que sólo se han incluido hipótesis que estuvieran documentadas en tales estudios, evitando así hipótesis no contrastadas. Ello supone que las hipótesis pueden resultar algo limitadas en algunos casos, dado que se ha priorizado la fiabilidad de las fuentes frente a la exhaustividad de su alcance, aunque los participantes tienen la oportunidad de enriquecer estos alcances realizando aportaciones y matizaciones en el apartado de comentarios dispuesto en cada pregunta.

The trend analysis carried out prior to this survey describes a future in which significant changes and mutations will continue to take place in the economic world in general and, therefore, in the organisation and company environment in particular. Variables relevant to the future of organisations and companies are numerous, but the most important identified in the trend analysis are included in this questionnaire, grouped in the fields indicated below.

El análisis de tendencias realizado previo a esta encuesta dibuja un futuro en el que continuarán las importantes transformaciones y mutaciones que se están produciendo en el mundo económico en general y por ende, en el entorno de las organizaciones y las empresas en particular. Las variables relevantes para el futuro de las organizaciones y empresas son numerosas, pero las más importantes que se han identificado en el análisis de tendencias se señalan a continuación, en función de los siguientes ámbitos:

[FIELD/ÁMBITO 1: Environment and Markets / Entorno y Mercados](#)  
[FIELD/ÁMBITO 2: Business Management / La Empresa](#)  
[FIELD/ÁMBITO 3: Job Market / Mercado de Trabajo](#)  
[FIELD/ÁMBITO 4: Quantitative Variables / Variables Cuantitativas](#)

When filling out the questionnaire, you may omit any questions you wish and you do not have to complete the whole questionnaire in one visit. When you return to the questionnaire, you will see your previous answers, which you can edit or add to them as you wish, and also the answers by other participants and the averages of ratings. You can submit your responses by clicking on "Submit this page" button that are in the rows, for submitting your entries thus far, or at the end of the form, for submitting all the responses at once. You are encouraged to return often, but please plan to complete your input before March 31, 2012.

Al completar el cuestionario, usted puede omitir cualquier pregunta que desee y no tiene que terminar el cuestionario entero en una visita. Cuando usted vuelve al cuestionario, verá sus respuestas anteriores, que puede corregir o ampliar como usted desee, y también las respuestas de otros participantes y las medias de valoraciones. Puede enviar sus respuestas pulsando el botón "Submit this page" (enviar esta página) que está en cada línea, para enviar sus respuestas hasta ese momento, o al final del formulario, para enviar todas las respuestas de una vez. Le animamos a volver al cuestionario a menudo, pero tenga previsto por favor completar su cuestionario antes del 2012-05-15.

Please return to the questionnaire often. When you return please enter as a returning participant AND use this email address: [millennium-project@igc.org](mailto:millennium-project@igc.org) AND this study code: **orgs**.

Please remember to press **SUBMIT** at end of questionnaire.

### Questionnaire

	Questions	Probability and time of occurrence <i>Probabilidad y horizonte de ocurrencia</i>	Impact to the future of business organizations <i>Impacto en el futuro de las organizaciones empresariales</i>	Impact to the future of cooperatives <i>Impacto en el futuro de las cooperativas</i>
1	<p>Globalisation will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP.</p> <p>La globalización continuará, con un crecimiento de las exportaciones y de la Inversión Extranjera Directa (IED) mayor que el del PIB.</p> <p>(details)</p> <p><a href="#">Submit this page</a></p>	<p>75 Probability of occurrence by 2030 (1 to 100) <i>Probabilidad de ocurrencia antes de 2030(1 a 100) ( 67.6 ) ( 96 )</i></p> <p>1 Importance to improving the standard of living (1=low; 10=high) <i>Importancia para la mejora del nivel de vida (1=bajo; 10=alto) ( 11 ) ( 96 )</i></p> <p>8 Your knowledge/expertise concerning this issue (1=none; 10=high) <i>Su conocimiento y/o experiencia con el tema (0=ningunos; 10=experto) ( 6.7 ) ( 96 )</i></p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>	<p>How large will be the impact for enterprises? (1 to 10; 10=huge) <i>¿Cómo de grande será el impacto para las empresas? (1 a 10; 10=enorme)</i></p> <p>8</p> <p>Changes are OK Average= 8.2 (95 )</p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>	<p>How large will be the impact for cooperatives? (1 to 10; 10=huge) <i>¿Cómo de grande será el impacto para las cooperativas? (1 a 10; 10=enorme)</i></p> <p>3</p> <p>Changes are OK Average= 8.3 (93 )</p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>
2	<p>New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc.</p> <p>Se desarrollarán nuevas definiciones del PIB que incluyan todo tipo de aspectos del bienestar nacional: energía, materiales, ecosistemas, capital social y humano, etc.</p> <p>(details)</p> <p><a href="#">Submit this page</a></p>	<p>99 Probability of occurrence by 2030 (1 to 100) <i>Probabilidad de ocurrencia antes de 2030(1 a 100) ( 67.2 ) ( 99 )</i></p> <p>9 Importance to improving the standard of living (1=low; 10=high) <i>Importancia para la mejora del nivel de vida (1=bajo; 10=alto) ( 14 ) ( 99 )</i></p> <p>9 Your knowledge/expertise concerning this issue (1=none; 10=high) <i>Su conocimiento y/o experiencia con el tema (0=ningunos; 10=experto) ( 7.3 ) ( 99 )</i></p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>	<p>How large will be the impact for enterprises? (1 to 10; 10=huge) <i>¿Cómo de grande será el impacto para las empresas? (1 a 10; 10=enorme)</i></p> <p>9</p> <p>Changes are OK Average= 6.5 (96 )</p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>	<p>How large will be the impact for cooperatives? (1 to 10; 10=huge) <i>¿Cómo de grande será el impacto para las cooperativas? (1 a 10; 10=enorme)</i></p> <p>9</p> <p>Changes are OK Average= 6.7 (95 )</p> <p>Reasons for your answer <i>Explicación de su respuesta</i> <a href="#">click here: hacer click aqui</a></p>
		Probability of occurrence by	How large will be the impact for	How large will be the impact for



## Future of Business Organisations Futuro de las Organizaciones Empresariales

Delphi on the Future of Business Organisations: Cooperativism and other Models  
Delphi Sobre el Futuro de las Organizaciones Empresariales: Cooperativismo y otros Modelos

To see a reference paper on this topic click [here](#) (use your browser's back arrow to return here)

Please answer the questions in the form below. When you return please enter as a returning participant AND use this email address: \_\_\_\_\_ AND this study code: orgs. This study is scheduled to close on 2012-04-15.

### Bypass introduction

This DELPHI study is being carried out within the framework of the International Year of Cooperatives 2012, as research that will stimulate debate and reflection on the future of business organisations in general and on cooperatives in particular, in order to be able to determine key factors for a future cooperative model. For each one of these variables, a series of hypotheses for the future have been formulated (to 2020-2030), these are used as the basis for the Delphi questionnaire presented below. When formulating the hypotheses, a documentary analysis was made of the main existing research and studies from sources relating to each one of the analysed variables, only hypotheses that were documented in those studies have been included, so avoiding untested hypotheses. This means that the hypotheses may be somewhat limited in some cases, given that the reliability of the sources has been prioritised over the exhaustiveness of its scope, although the participants have the chance to enrich these scopes by making contributions and points in the comments section provided for each question.

El presente estudio DELPHI se realiza en el marco del Año Internacional de las Cooperativas 2012, como una investigación que promueva el debate y la reflexión sobre el futuro de las organizaciones empresariales en general y sobre las cooperativas en particular, de cara a poder determinar los factores clave del modelo de las cooperativas del futuro. Para cada uno de esas variables, se han formulado una serie de hipótesis de futuro (a 2020-2030), que son la base del cuestionario Delphi a expertos que se presenta a continuación. A la hora de formular las hipótesis, se ha realizado un análisis documental de las principales investigaciones y estudios existentes de fuentes relevantes en cada una de las variables analizadas, de manera que sólo se han incluido hipótesis que estuvieran documentadas en tales estudios, evitando así hipótesis no contrastadas. Ello supone que las hipótesis pueden resultar algo limitadas en algunos casos, dado que se ha priorizado la fiabilidad de las fuentes frente a la exhaustividad de su alcance, aunque los participantes tienen la oportunidad de enriquecer estos alcances realizando aportaciones y matizaciones en el apartado de comentarios dispuesto en cada pregunta.

The trend analysis carried out prior to this survey describes a future in which significant changes and mutations will continue to take place in the economic world in general and, therefore, in the organisation and company environment in particular. Variables relevant to the future of organisations and companies are numerous, but the most important identified in the trend analysis are included in this questionnaire, grouped in the fields indicated below.

El análisis de tendencias realizado previo a esta encuesta dibuja un futuro en el que continuarán las importantes transformaciones y mutaciones que se están produciendo en el mundo económico en general y por ende, en el entorno de las organizaciones y las empresas en particular. Las variables relevantes para el futuro de las organizaciones y empresas son numerosas, pero las más importantes que se han identificado en el análisis de tendencias se señalan a continuación, en función de los siguientes ámbitos:

**FIELD/ÁMBITO 1: Environment and Markets / Entorno y Mercados**

**FIELD/ÁMBITO 2: Business Management / La Empresa**

**FIELD/ÁMBITO 3: Job Market / Mercado de Trabajo**

**FIELD/ÁMBITO 4: Quantitative Variables / Variables Cuantitativas**

When filling out the questionnaire, you may omit any questions you wish and you do not have to complete the whole questionnaire in one visit. When you return to the questionnaire, you will see your previous answers, which you can edit or add to them as you wish, and also the answers by other participants and the averages of ratings. You can submit your responses by clicking on "[Submit this page](#)" button that are in the rows, for submitting your entries thus far, or at the end of the form, for submitting all the responses at once. You are encouraged to return often, but please plan to complete your input before April 15, 2012.

Al completar el cuestionario, usted puede omitir cualquier pregunta que desee y no tiene que terminar el cuestionario entero en una visita. Cuando usted vuelve al cuestionario, verá sus respuestas anteriores, que puede corregir o ampliar como usted desee, y también las respuestas de otros participantes y las medias de valoraciones. Puede enviar sus respuestas pulsando el botón "[Submit this page](#)" (enviar esta página) que está en cada línea, para enviar sus respuestas hasta ese momento, o al final del formulario, para enviar todas las respuestas de una vez. Le animamos a volver al cuestionario a menudo, pero tenga previsto por favor completar su cuestionario antes del 2012-04-15.

Please return to the questionnaire often. When you return please enter as a returning participant AND use this email address: \_\_\_\_\_ AND this study code: orgs.

**Please remember to press SUBMIT at end of questionnaire.**

## Questionnaire

For each development, there were asked three sets of questions:

### Probability and time of occurrence

#### Probabilidad y horizonte de ocurrencia

- Probability of occurrence by 2030 (1 to 100)  
Probabilidad de ocurrencia antes de 2030(1 a 100)
- Importance to improving the standard of living (1=low; 10=high)  
Importancia para la mejora del nivel de vida (1=bajo; 10=alto)
- Your knowledge/expertise concerning this issue (1=none; 10=high)  
Su conocimiento y/o experiencia con el tema (0= ningúnos; 10=experto)

Reasons for your answer; Explicación de su respuesta  
click [here](#); hacer click [aquí](#)

### Impact to the future of business organizations

#### Impacto en el futuro de las organizaciones empresariales

- How large will be the impact for enterprises? (1 to 10; 10=huge)  
¿Cómo de grande será el impacto para las empresas? (1 a 10; 10=enorme)

Reasons for your answer; Explicación de su respuesta  
click [here](#); hacer click [aquí](#)

### Impact to the future of cooperatives

#### Impacto en el futuro de las cooperativas

- How large will be the impact for cooperatives? (1 to 10; 10=huge)  
¿Cómo de grande será el impacto para las cooperativas? (1 a 10; 10=enorme)

Reasons for your answer; Explicación de su respuesta  
click [here](#); hacer click [aquí](#)

*At the end of the questionnaire, the participants were invited to add additional suggestions:*

#### ADDITIONAL SUGGESTIONS

To submit comments AND suggestions click [here](#)

Please remember to return to the questionnaire often. When you come back, you will see how the group's answers have evolved AND can edit your comments in response. If you have difficulties please send your questions to [realtimedelphi@att.net](mailto:realtimedelphi@att.net) .

To go to the top of this form click [here](#)

To sign out click [here](#)

## The Questions:

1....Globalisation will continue, with a growth of exports and of Direct Foreign Investment (DFI) greater than that of GDP.

*La globalización continuará, con un crecimiento de las exportaciones y de la Inversión Extranjera Directa (IED) mayor que el del PIB.*

2....New definitions of GDP will be developed that will include all kinds of aspects relating to national well-being: energy, materials, eco-systems, social and human capital, etc.

*Se desarrollarán nuevas definiciones del PIB que incluyan todo tipo de aspectos del bienestar nacional: energía, materiales, ecosistemas, capital social y humano, etc.*

3....By 2030, the gap between rich and poor countries will be reduced and in the latter case it will especially important for helping to reduce poverty. The non-profit-making sector will become more important in both, developed and developing regions.

*En 2030 el gap existente entre países ricos y pobres se reducirá y en este último caso será especialmente importante para ayudar a reducir la pobreza. El sector sin ánimo de lucro ganará importancia tanto en las regiones desarrolladas y en desarrollo.*

4....In 2030, there will continue to be large differences between rich and poor countries in their capacity to innovate, as the latter will not have the necessary financial resources and personnel.

*En 2030 seguirá habiendo grandes diferencias en la capacidad para innovar entre países ricos y pobres, ya que estos últimos no contarán con los recursos financieros y personales necesarios.*

5....The gap in the level of literacy between men and women will be reduced in developing countries, but with regional differences; the gap will be reduced by a larger degree in China, while in Africa, progress will be very slow.

*El gap en el nivel de alfabetismo entre hombres y mujeres se reducirá en los países en desarrollo, pero con diferencias regionales; el gap se reducirá en mayor medida en China, mientras que en el caso de África, el progreso será muy lento.*

6....By 2030, the gap existing between rich and poor countries as regards health care will be reduced thanks to advances in the biotechnology sector.

*En 2030 el gap existente entre países ricos y pobres en cuanto al cuidado de la salud se reducirá gracias a los avances en el sector de la biotecnología.*

7....Higher intensity in the level of protectionism is expected on trade and investments at a global level.

*Se espera una mayor intensidad en el nivel de proteccionismo sobre el comercio e inversiones a nivel mundial.*

8....In the case of the US, for example, the perception of inequality in the benefits of globalisation could intensify protectionism.

*En el caso de EEUU por ejemplo, la percepción de desigualdad en los beneficios provocada por la globalización podrá intensificar el proteccionismo.*

9....In order to ensure that public-private collaboration continues to play its role over the long term, the European Commission will establish an effective cooperation and training framework to cover the public and private sector.

*A fin de garantizar que la colaboración público-privada siga desempeñando su papel a largo plazo, la Comisión Europea establecerá un marco de cooperación efectivo y capacitador entre el sector público y el privado.*

10....In the case of technological development and investments in R&D, the establishment of partnerships and cooperation networks will increase. In addition to the financial advantages, synergies will be developed in various fields as a result of collaborative agreements between companies, universities and research centers.

*En el caso del desarrollo tecnológico e inversiones en I+D, crecerá el establecimiento de partenariados y redes de cooperación. Además de las ventajas financieras, se producirán sinergias en diversos campos gracias a los acuerdos colaborativos entre empresas, universidades o centros de investigación.*

11....Main future sectors: the aerospace industry, health and safety, environment and climate change, energy, industries linked to sustainable mobility and other industries linked to chemistry, engineering, transport, and agri-food. As regards sectors associated with future technologies: nanotechnology, micro and nano electronics, biotechnology, photonics, new materials and advanced manufacturing technologies.

*Principales sectores de futuro: industria aeroespacial, salud y seguridad, medioambiente y cambio climático, energía, industrias ligadas a la movilidad sostenible y otras industrias ligadas a la química, ingeniería, transporte y agroalimentación. En cuanto a los sectores asociados a las tecnologías de futuro: nanotecnología, micro y nano electrónica, biotecnología, fotónica, nuevos materiales y tecnologías avanzadas de fabricación.*

12....By 2030, biotechnology will be especially important in developing countries, as regards agriculture (green biotechnology) and industry (white biotechnology), in order to combat climate change, demographic evolution and the limitation of natural resources.

*En 2030, en los países en desarrollo la biotecnología tendrá especial importancia, en relación a la agricultura (biotecnología verde) y a la industria (biotecnología blanca), para luchar así contra el cambio climático, evolución demográfica y limitación de recursos naturales.*

13....Banking sector: The banks of emerging countries will catch up with those of the G-7 in 2036 and in 2050 they will be 50% larger. Chinese banks will catch up with those of the US in 2023 and in 2030 its assets will be worth 4 billion dollars more than American banks. India will overtake Japan in 2033.

*Sector bancario: Los bancos de los países emergentes alcanzarán a los del G-7 en 2036 y, en 2050, serán un 50% más grandes. La banca china alcanzará en 2023 a la de EEUU y, en 2030, sus activos valdrán 4 billones de dólares más que los de banca americana. India superará a Japón en 2033.*

14....In 2040, the main sectoral Clusters will be the following and located in:

- Asset management: London, New York, Singapore
- Pharmaceutical Industry: London, New York, Singapore

- Automotive assembly: Sao Paulo, Nanjing (China), Tianjin (China)
- University education: New York, Boston, London
- Cinema and entertainment: Los Angeles, Mumbai, Shanghai

*En 2040, los principales Clusters sectoriales serán los siguientes, ubicados en:*

- *Gestión de activos: Londres, Nueva York, Singapur*
- *Industria farmacéutica: Londres, Nueva York, Shangai*
- *Montaje de automoción: Sao Paulo, Nanjing (China), Tianjin (China)*
- *Educación universitaria: Nueva York, Boston, Londres*
- *Cine y entretenimiento: Los Angeles, Bombai, Shangai*

15....Those countries with the greatest demographic and per capita income growth will be considered as the most attractive geographical markets.

*Serán aquellos países con mayor crecimiento demográfico y de renta per cápita los considerados como más atractivos mercados geográficos.*

16....Real GDP will grow 4 times more quickly in developing countries than in developed countries, reaching annual growths of 6.7%.

*El PIB real de los países en desarrollo crecerá 4 veces más rápido que en el caso de los países desarrollados, alcanzando crecimientos del 6,7% anuales.*

17....China's GDP will exceed that of the United States to become the biggest economy in the world in 2026.

*El PIB de China superará al de Estados Unidos para convertirse en la mayor economía del mundo en 2026.*

18....The BRIC countries will continue to be the most interesting markets for Direct Foreign Investment in 2030. By 2030, the share of exports of the BRIC countries compared with world exports will be on a par with the European (EU 27) export share, of approximately 23%.

*Los países BRIC seguirán siendo en 2030 los mercados más interesantes para la Inversión Directa Extranjera. La participación de las exportaciones de los países BRIC respecto a las exportaciones mundiales, estará a la par de la participación de las exportaciones europeas (EU 27) en 2030, suponiendo esta participación aproximadamente un 23%.*

19....Exports from India will grow by 13% per year until 2030, followed by China (7.1%), Brazil (6.5%) and Russia (4.9%).

*Las exportaciones de India crecerán hasta 2030 en un 13% al año, seguido de China (7,1%), Brasil (6,5%) y Rusia (4,9%).*

20....Increase in purchasing power: The middle class in BRIC countries will grow by 150% from 800 million currently to 2000 million by 2030.

*Incremento del poder adquisitivo: la clase media de los países BRIC crecerá en un 150%, de 800 millones de personas en la actualidad a 2.000 millones en 2030.*

21....“Next Eleven” Countries: Bangladesh, Egypt, Indonesia, Iran, Mexico, Nigeria, Pakistan, Philippines, South Korea, Turkey and Vietnam. Their real GDP will grow by 5.9% annually over the next 20 years, reaching 30% of the total GDP of the BRIC countries and 11% of world GDP.

*Países “Next Eleven”: Bangladesh, Egipto, Indonesia, Irán, México, Nigeria, Pakistán,*

*Filipinas, Corea del Sur, Turquía y Vietnam. Tendrán un crecimiento del PIB real de un 5,9% anual en los próximos 20 años, alcanzando el 30% del PIB total de los países BRIC y el 11% del PIB mundial.*

22....South Africa, Nigeria, Egypt and Angola will be the African countries with the highest growth. Africa will increase its world exports from the current 2.8% to 7.1% by 2030.

*Sudáfrica, Nigeria, Egipto y Angola serán los países africanos que más crecerán. África incrementará sus exportaciones mundiales desde el 2,8% actual al 7,1% en 2030.*

23....Africa's middle class will grow strongly to 2030, increasing by more than 110 million in the next 20 years, from the current 55 million to 180 million in 2030 (5% of the world's middle class).

*La clase media de África crecerá con fuerza hacia 2030, creciendo en más de 110 millones de personas en los próximos 20 años, de los 55 millones actuales, a 180 en 2030 (5% del clase media global).*

24....Without counting Brazil, Argentina will be the largest economy in South America in 2030, reaching a fifth of Brazil's GDP. The countries with the next highest growth in GDP will be Columbia, Chile and Venezuela. Global exports from South America will go from the current 5.6% to 6.3% in 2030.

*Sin contar Brasil, Argentina será la economía más grande de Sudamérica en 2030, alcanzando una quinta parte del PIB de Brasil. Seguidamente, serán Colombia, Chile y Venezuela los países que mayor crecimiento del PIB tendrán. Las exportaciones mundiales de Sudamérica pasarán del 5,6% actuales al 6,3% en 2030.*

25....Extra-financial factors: brands, technology, capacity for innovation, information systems, customer relationships, business culture values, image or reputation will, like intellectual capital, contribute to the strengthening of companies and to the fundamental improvement of capabilities and competencies in the medium to long term. Consequently, it can be seen that the mission of managers must be to maximise expectations for value in the long-term, despite some short-term gain sacrifices.

*Los factores extra-financieros, que como el capital-intelectual, las marcas, la tecnología, la capacidad de innovación, los sistemas de información, las relaciones con los clientes, los valores de la cultura empresarial, la imagen o la reputación, contribuyen al fortalecimiento de las empresas y a la mejora de sus capacidades y competencias fundamentalmente a medio y largo plazo. Consecuentemente, se observa que la misión de los gestores debe ser, maximizar las expectativas de valor en el largo plazo, aunque para ello deban sacrificarse las ganancias fáciles en el corto plazo.*

26....According to Forrester consultancy group, the mass customisation of the future will be more social, physical (technologies such as Microsoft XBOX Kinect, etc.), mobile, intimate (even more customised), integrated (greater change of products), based on platforms (shared technologies) and co-created (using customisation to create more significant solutions and standard products). These products will lead to unprecedented customer loyalty levels and will generate a strong product market differentiation.

*Según la consultora Forrester, la personalización masiva o mass customization del futuro será*

*más social, física (tecnologías como Microsoft XBOX Kinect,...), móvil, íntima (incluso más personalizada), integrada (mayor cambio de productos), basada en plataformas (tecnologías compartidas) y co-creada (utilizar la personalización para generar soluciones más significativas y productos estándares). Estas ofertas llevarán a unos niveles de lealtad del cliente sin precedentes y generarán una potente diferenciación de mercado de los productos.*

27....For 2020, global investment demand could reach maximum levels and consequently, the difference between capital demand and savings will probably increase real interest rates in the long term. For this reason, companies, financial institutions, consumers, investors and governments will have to adapt to a world in which capital is more expensive and less abundant, and where more than half of savings and investment is concentrated on emerging markets. This means that business models should evolve, investors should develop new strategies and governments could play a significant role in facilitating this transition.

*Para 2020, la demanda global de inversión podría alcanzar niveles máximos y consecuentemente, la diferencia entre la demanda de capital y la oferta de ahorro, incrementará probablemente los tipos de interés reales a largo plazo. Por ello, las empresas, las instituciones financieras, los consumidores, los inversores y los gobiernos se tendrán que adaptar a un mundo en el que el capital es más caro y menos abundante, y donde más de la mitad del ahorro y la inversión se concentra en los mercados emergentes. Esto supone que los modelos de negocio deberán evolucionar, los inversores deberán desarrollar nuevas estrategias y los gobiernos podrían jugar un papel importante en facilitar esta transición.*

28....In the 2020s economic system, productive entrepreneurship will be acknowledged and supported. It will be encouraged by a policy of stricter competition that will better serve growth through innovation rather than by mergers and acquisitions. Institutional structures will be established to provide long-term finance for companies that enter new areas such as those of the low carbon economy, to improve the use of existing technologies or transform cultural and creative value into new commercially exploitable products and services, including investments in brand value.

*En la economía de 2020, el emprendizaje productivo será reconocido y apoyado. Será animado por una política de competencia más estricta que pasa más por el crecimiento a través de la innovación que por el camino de las fusiones y adquisiciones. Se establecerán estructuras institucionales para proporcionar financiación a largo plazo para empresas que se introduzcan en nuevas áreas como las de la economía baja en carbono, mejorar el uso de tecnologías existentes, o transformar el valor cultural y creativo en nuevos productos y servicios comercialmente explotables, incluyendo las inversiones en el valor de marca.*

29....The concept of non-ownership will emerge, as distinct from private ownership or state ownership. An example of this is open source software.

*Surgirá la figura de la no-propiedad, como diferenciada de la propiedad privada o la propiedad estatal. Un ejemplo de ello es el software libre.*

30....Self employment via Internet - individuals seek markets for their abilities rather than jobs. New simpler methods will be developed so that individuals can invest directly in start-up companies and in research.

*El auto-empleo vía Internet – los individuos buscan mercados para sus competencias en lugar de*



*empleos. Se desarrollan nuevas formas más simples para que los individuos puedan invertir directamente en compañías start-up y en investigación.*

31....India will continue to maintain its world leadership in Information Technology Business Process Outsourcing (IT-BPO), the Indian market increasing from 71,600 million dollars in 2009 to 285,000 millions of dollars in 2020, with an annual growth of 15% approximately.

*India seguirá manteniendo su liderazgo mundial en el Outsourcing de Procesos de Tecnologías de la Información (IT-BPO), pasando el mercado indio de los 71.600 millones de dólares en 2009 a 285.000 millones de dólares en 2020, con un crecimiento anual del 15% aproximadamente.*

32....Another option will be to outsource innovation to other network business partners, thus distributing the value of the innovation along the value chain, thus reducing the cost to the companies.

*Otra opción será la de externalizar la innovación a otros socios empresariales que trabajan en red, distribuyendo así el valor de la innovación a lo largo de la cadena de valor, reduciendo así las empresas el coste que supone.*

33....Thus, it is predicted that in 2020 polarisation between large multinationals and small business projects developed over a network will take place:

- On the one hand, there will be a market dominated by multinationals that will be increasingly large and influential and will have a budget larger than many countries.

- On the other, organisations will have smaller and less hierarchical structures made up of networked professionals working on projects and in different countries. Many of these professionals will not even form part of the organisations, but will be grouped together in collaborative networks and offer services and products of high added value to those multinationals.

In both cases, the companies will be more flexible, diverse and dynamic.

*Así, se prevé que en 2020 se producirá una polarización entre grandes multinacionales y pequeños proyectos empresariales desarrollados en red:*

*- De un lado, habrá un mercado copado por multinacionales que cada vez serán más grandes e influyentes y que dispondrán de un presupuesto superior al de muchos países.*

*- Por otro, las organizaciones contarán con estructuras más pequeñas y menos jerárquicas, compuestas por profesionales que trabajarán en red, por proyectos y en diferentes países.*

*Muchos de estos profesionales incluso no formarán parte de organizaciones, sino que se agruparán en redes colaborativas y ofrecerán servicios y productos de alto valor agregado a aquellas multinacionales.*

*En ambos casos se tratará de compañías más flexibles, diversas y dinámicas.*

34....In the case of the banks, after the financial crisis, the increased focus on international governance, the stress test analysis of scenarios, liquidity and capital adequacy, should result in the value of governance functions, risks and compliance being more apparent.

*En el caso de la banca, tras la crisis financiera, el mayor enfoque hacia la gobernanza internacional, los test de estrés, los análisis de escenarios, la liquidez y la adecuación de capital, debería suponer que el valor de las funciones de la gobernanza, riesgos y conformidad deberían ser más aparentes.*

35....With a view to the "Europe 2020" strategy, the introduction of employee financial participation may help companies in Europe, in particular SMEs, to improve their competitiveness as it increases identification with them and links with their qualified workers - both in good and bad times. Thus, the employees' financial participation can also contribute to ensuring a sustainable future.

*Con vistas a la estrategia "Europa 2020", la introducción de la participación financiera de los trabajadores puede ayudar a las empresas en Europa, en particular también a las PYME, a mejorar su competitividad, ya que aumenta la identificación con ellas y la vinculación de sus trabajadores cualificados –tanto en los buenos como en los malos tiempos–. Así, la participación financiera de los trabajadores también contribuirá a garantizar un futuro sostenible.*

36....According to the "Al(l)one" Scenario of the report "Worker Participation 2030. Four scenarios", the 2020 decade will see a development in the concept of cooperatives as organisations made up of various groups to achieve their specific common objectives, in fields such as energy, health, mobility and the financial sector for supporting local projects. In this context, to seek the size of company appropriate to the organisation's objectives instead of growth as an end in itself, it will limit the risk of losing direction and entering a spiral of "more growth or die".

*Según el Escenario "Al(l)one" del informe "Worker Participation 2030. Four scenarios", la década de 2020 observará un desarrollo de la figura de las cooperativas, como organizaciones constituidas por diversos grupos para alcanzar sus objetivos específicos comunes, en ámbitos como la energía, la salud, la movilidad y el sector financiero de apoyo a proyectos locales. En este contexto, buscar el tamaño de empresa adecuado a los objetivos de la organización en lugar de crecer como fin en sí mismo, limitará el riesgo de perder el rumbo y entrar en una espiral de "crecer más o morir".*

37....Management by understanding is developed as distinct from by objectives or authority, so that each employee has an understanding of the whole organisation, making decisions in a fast changing environment.

*Se desarrolla la gestión por comprensión como diferenciada de la gestión por objetivos o autoridad, de manera que cada empleado tiene la idea del conjunto de la organización, tomando decisiones en un entorno de cambio rápido.*

38....According to the "Global Interest" Scenario for 2018, an effective globalised response to global challenges leads to an increase in resource productivity and low carbon growth. Successful companies have integrated sustainability management throughout the organisation. Corporate Social Responsibility (CSR) departments belong to the past.

*De acuerdo al escenario "Global Interest" para 2018, una respuesta efectiva globalizada a los desafíos globales provoca un aumento de la productividad de los recursos y un crecimiento bajo en carbono. Las compañías exitosas han integrado la gestión de la sostenibilidad en toda la organización. Los departamentos de Responsabilidad Social Empresarial (RSE) son algo del pasado.*

39....The rise of a new middle class in emerging economies will lead to unprecedented shifts in the consumer of 2020, such as relatively small and discounted purchases. Climate change, sustainability and the purchase of healthy products of natural origin will increasingly become topics of interest for consumers all over the world. As regards developments in technology, the implications of the method of attracting consumers to adopt or purchase products will be increasingly clear, in view of the increased information to which they have access.

*El surgimiento de una nueva clase media en las economías emergentes provocará cambios sin precedente en el consumidor del año 2020, como compras relativamente pequeñas y por descuentos. El cambio climático, la sostenibilidad y la compra de productos saludables y de origen natural, cada vez más se convertirán en temas de interés de los consumidores de todas partes del mundo. En cuanto al desarrollo tecnológico, serán cada vez más notorias las repercusiones en la forma de atraer a los consumidores en la adopción o adquisición de productos, ante la mayor información a la que tienen acceso.*

40....As global knowledge connectivity and generation increases, companies need to establish a system that combines knowledge from different areas in an efficient, up-to-date network. Openness to the knowledge of others, knowledge sharing and common knowledge creation will become key targets for enterprises. For this, social networks, semantic web technologies and open innovations will play an important role, Web 2.0 will advance to Web 3.0.

*A medida que se incrementa la generación de conocimiento y la conectividad, las empresas necesitan establecer un sistema en red que combine el conocimiento de diversas y diferentes áreas de una manera eficiente y actualizada. La apertura al conocimiento de otros, el compartir el conocimiento y la creación de conocimientos comunes se convertirán en objetivos primordiales para las organizaciones. Por ello, la proliferación de las redes sociales, las tecnologías web semánticas y las innovaciones abiertas (“open innovations”), pasando de la Web 2.0 a la Web 3.0.*

41....According to the “Factories of the Future” initiative, the focus of European industrial production to 2020 will be intelligent sustainable production, based on high performance ICTs based on the use of new materials.

*De acuerdo con la iniciativa “Factories of the Future”, el enfoque de la producción industrial europea a 2020 será la producción sostenible, inteligente basada en TICS, de alto rendimiento y basada en la utilización de nuevos materiales.*

42....According to the report “The Future of Corporate Innovation”, the centralised R&D models will be replaced by open innovation structures. The vision for the Innovation Network: Simple, transparent, instantaneous and with global access to globally distributed R&D resources and services.

*Según el informe “The Future of Corporate Innovation”, los modelos de I+D centralizados serán sustituidos por estructuras de innovación abierta. La visión sobre la Red de Innovación: Simple, transparente, instantánea y con acceso mundial a recursos y servicios de I+D globalmente distribuidos.*

43....By 2030, the economically active population will have grown by 21% compared to 2010. Developing countries will grow by 931 million workers, equivalent to 24%. However, in developed countries it will be reduced by one million, mainly due to the ageing of their societies.

*En 2030, la población económicamente activa crecerá un 21 por ciento respecto a 2010. Los países en vías de desarrollo tendrán un crecimiento de 931 millones de trabajadores, equivalente a 24 por ciento. Sin embargo, en países desarrollados disminuirá un millón principalmente por el envejecimiento de sus sociedades.*

44....Occupations requiring highly and poorly skilled workers in the job market will increase in terms of jobs and salaries but the number of semi-skilled workers will decrease, leaving rich countries with an hourglass economy.

*Las ocupaciones altamente cualificadas o poco cualificadas en el mercado laboral, aumentarán en términos de empleos y salarios pero disminuirán los trabajadores semi-cualificados, dejando a los países ricos con una economía de reloj de arena.*

45....Employment growth will be mainly in the areas: financial services, health care workers for older people, fight against climate change and infrastructure in the BRIC countries.

*Ámbitos de crecimiento del empleo: Servicios financieros, Cuidados de la salud para personas mayores, Lucha contra el cambio climático e Infraestructura en los BRIIC.*

46....In the spirit of conciliation, the concept of "Flexi-time" will be extended into the future, so that work may start and finish at any time.

*En sentido de la conciliación, el concepto de "flexi-time" estará extendido en el futuro, de manera que el trabajo pueda empezar y terminar a cualquier hora.*

47....The economic valuation of a job continues to change to a more subjective perception of the post, with a demand for conditions that take diversity into account as well as measures that help to achieve a better balance in all aspects of life.

*La valoración económica del empleo va cambiando hacia una percepción más subjetiva del puesto, demandando unas condiciones que tengan en cuenta la diversidad y unas medidas que ayuden a un mejor equilibrio de todos los aspectos de la vida.*

48....In two decades time there will be more equality between men and women. The differences between men and women as regards primary education will be nearly non-existent by 2030. As of secondary education, the difference will decrease considerably, to 48% of men and 40% of women.

*En dos décadas habrá más igualdad entre hombres y mujeres. Las diferencias entre hombres y mujeres en cuanto a educación primaria serán casi inexistentes en 2030. En cuanto a la educación secundaria, la diferencia se disminuirá considerablemente, con un 48% de hombres y 40% de las mujeres.*

49....The demographic drop in developed countries, the greater percentage of highly skilled women and the growth of the knowledge society will mean that organisations will attempt to attract a greater number of professional women.

*De esta manera, el descenso demográfico en los países desarrollados, el mayor porcentaje de mujeres altamente cualificadas y el crecimiento de la sociedad del conocimiento provocará que las organizaciones potencien la atracción de un mayor número de mujeres profesionales.*

50....There are 240 million migrant workers in the world. It will be important, therefore, to maintain open borders to encourage the movement of qualified workers, and agreements will be defined to facilitate immigration, for example, through the creation of a code that regulates migrant flows at a global level. Furthermore, intercultural management within organisations will be another challenge that will enrich their knowledge and will acquire particular relevance in the interrelationships and/or conflicts between workers with other cultures and societies different to those of the country of origin, and it will go beyond the vision of a work approach from the perspective of a single culture to a multicultural vision as demanded by an increasingly competitive market.

*Existen más de 240 millones de trabajadores migrantes en el mundo. Será importante por tanto mantener las fronteras abiertas para favorecer el movimiento del trabajo cualificado y se definirán acuerdos para facilitar la inmigración, por ejemplo, a través de la creación de un código que regule los flujos migratorios en el ámbito mundial. Por otro lado, la gestión de la interculturalidad en las organizaciones será otro reto que enriquecerá el conocimiento de las mismas y adquirirán gran relevancia las interrelaciones y/o conflictos de los trabajadores con otras culturas y sociedades diferentes a las de origen y trascenderá la visión del enfoque de trabajo desde la perspectiva de una única cultura hacia una visión multicultural como exigencias de un mercado cada día más competitivo.*

51....New generations such as the generation M (the Multimedia, Messenger, MySpace, Multitask, etc. generation), will create a new pace and new ways to perform in the work environment (multitasks, interactivity, new values, etc.), and it will be necessary to work on incentives to use the new technologies and networks at all levels, reducing the existing gap, especially with older workers. On the other hand, the aging of the active population in many of the most developed societies and the lack of a generational replacement leads to a scenario that we must address from the present with policies and programmes aimed at flexibility in work, continuous learning, transmission of knowledge and to non discrimination due to age in the job market (in the European Union, 64% of those surveyed thought that the economic crises would bring with it an increase in age discrimination in the job market).

*Las nuevas generaciones como la generación “M” (generación Multimedia, Messenger, MySpace, Multitarea..) marcarán nuevos ritmos y nuevas formas de actuar en el entorno laboral (multitareas, interactividad, nuevos valores,..) y será preciso trabajar en la incentivación del uso de las nuevas tecnologías y redes a todos los niveles, reduciendo la brecha existente, especialmente con los trabajadores de mayor edad. En el lado contrario, el envejecimiento de la población activa en muchos de las sociedades más desarrolladas y la falta de relevo generacional plantea un escenario con que tendremos que afrontar desde el presente con políticas y programas dirigidos a la flexibilidad en el trabajo, el aprendizaje permanente, la transmisión del conocimiento y a la no discriminación por edad en el mercado de trabajo (en la Unión Europea el 64% de los encuestados pensaba que la crisis económica conllevaría un aumento de la discriminación por edad en el mercado de trabajo).*

52....Today, globally, life expectancy at birth is 68, which is expected to rise to 81 by 2100. Around 20% of the world's population will be over 60 in 2050, around 20% of Europeans are 60 or over compared with 10% in Asia and Latin America and 15% in Africa. More than 20 countries have decreasing populations which could increase to 44 in 2050, the majority of these in Europe. People will have a longer life and there will be more opportunities for telework, part

time work and work rotation to reduce the economic load on the younger generations and to maintain standards of living.

*Hoy la esperanza de vida al nacer es de 68 años a nivel mundial que se preve que crezca a 81 años a 2100. Alrededor del 20% del mundo tendrá más de 60 años en 2050, alrededor del 20% de los europeos tiene 60 ó más comparado con un 10% en Asia y América Latina y el 15% en África. Así más de 20 países tienen poblaciones decrecientes que podrían aumentar a 44 en 2050, la mayoría de ellas en Europa. La gente tendrá una vida más prolongada y creará más oportunidades de teletrabajo, trabajo a tiempo parcial y de rotación laboral para reducir la carga económica en las generaciones más jóvenes y para mantener los estándares de vida.*

53....Companies will increasingly adopt a total compensation flexible scheme, like an "al la cart" menu, where the employees will have a mandatory basic benefits part and complete freedom to select, integrate and finance a flexible package of benefits that will respond very specifically to their needs and aspirations.

*En el futuro las empresas harán énfasis cada vez más marcado en un esquema de compensación total, en el que los empleados tendrán libertad amplia y la responsabilidad para conformar y financiar su paquete de prestaciones. Probablemente, éste será como "un menú de opciones a la carta" en el que el empleado tendrá una parte obligatoria de prestaciones básicas, sobre todo de previsión de riesgos y gozará de libertad absoluta para seleccionar, integrar y financiarse un paquete de prestaciones que responda muy específicamente a sus necesidades y aspiraciones, derivadas de su situación familiar particular y de su estilo de vida. Además, esos planes de prestaciones probablemente serán muy flexibles, para responder a la diversidad de los empleados.*

54....Organisations will develop strategies to attract talent focussed at a global level, beyond local and national borders. With the aim of attracting the best professionals, organisations will intensify their cooperation with universities. Furthermore, talent retention strategies will become key aspects for companies and organisations, with the aim of strengthening the workforce and work teams.

*Las organizaciones desarrollarán estrategias de atracción del talento enfocadas a nivel mundial, más allá de las fronteras locales y nacionales. Con el objetivo de atraer a los y las mejores profesionales, las organizaciones intensificarán la cooperación con universidades. Asimismo, las estrategias de retención del talento se convertirán en aspectos clave para empresas y organizaciones, con el objetivo de fortalecer las plantillas y equipos de trabajo.*

55....For 2030, globalisation of the job market will lead to the migration of workers to places and countries with attractive job markets and societies with a good quality of life where "talent attraction" will be seen, while other countries will experience a "brain drain".

*Para el año 2030, la globalización del mercado de trabajo dará lugar a una migración de trabajadores a lugares y países con mercados laborales atractivos y sociedades con una amplia calidad de vida donde se observará una "atracción de talento" mientras que otros países experimentarán una "fuga de cerebros".*

56....Furthermore, recruitment of professionals will be carried out through social networks, a low-cost and good quality method that will also allow access to databases of professionals throughout the world.

*Por otra parte, el reclutamiento de profesionales se realizará a través de las redes sociales, una vía de bajo coste y gran calidad que permitirá acceder además a bases de datos de profesionales de todo el mundo.*

57....The lack of talent will intensify both in developing and developed countries on the 2030 horizon; in developed countries the reason will be due to a reduction in the supply of professionals, while in developing countries it will be due to the increase in demand for professionals.

*La falta de talento se intensificará tanto en los países en desarrollo como en los países desarrollados en el horizonte 2030; en los países desarrollados la razón será la reducción de la oferta de profesionales, mientras que en los países en desarrollo se deberá al incremento de demanda de profesionales.*

58....Developed economies will lose an average 20,000 million Euros per country due to the lack of qualified professionals.

*Las economías desarrolladas perderán como media 20.000 millones de Euros por país debido a la falta de profesionales cualificados.*

59....In developing countries, the population of working age will continue to grow, but in the countries with a strong GDP (e.g. China), the demand for employees will greatly outstrip the supply (while other developing countries could face high levels of unemployment).

*Países en desarrollo: continuará el crecimiento en la población en edad de trabajar, pero en aquellos países con un fuerte PIB (ej: China), la demanda de empleados/as será mucho mayor que la oferta (mientras que otros países en desarrollo puedan enfrentarse a altos niveles de desempleo).*

60....Variable: There are co-operatives in all the world's countries, and it is estimated that 1000 million people are members of cooperatives.

*Hay cooperativas en todos los países del mundo y se estima que 1.000 millones de personas son miembros de cooperativas.*

61....Variable: The 300 largest cooperative businesses at a global level in 2008 had a total operations volume of 1.1 billion dollars.

*Las 300 empresas cooperativas más grandes a nivel mundial en 2008 tuvieron un volumen total de operaciones de 1,1 billones de dólares.*

62....Variable: The majority of the 300 largest cooperatives in the world are in the developed economies of Germany, the United States, France, Japan, and the Low Countries.

*La mayoría de las 300 cooperativas más grandes del mundo se encuentran en las economías desarrolladas de Alemania, los Estados Unidos, Francia, el Japón y los Países Bajos.*

63....Variable: Distribution by sectors of these 300 cooperatives is as follows: 30% in agriculture and food; 23% in the retail trade; 22% in insurance; and 19% in the banking sector.

*La distribución por sectores de estas 300 cooperativas es la siguiente: 30% en agricultura y alimentación; 23% en comercio minorista; 22% en seguros; y 19% en el sector bancario.*

64....Variable: In the US, more than 900 electrical supply cooperatives provide services to more than 42 million people in 47 states. This represents 42% of the electrical distribution lines and covers 75% of the country's territory.

*En EEUU, más de 900 cooperativas de suministro eléctrico prestan servicios a más de 42 millones de personas en 47 estados. Esto representa el 42% de las líneas de distribución eléctrica y abarca el 75% del territorio del país.*

65....Variable: In Europe, the agricultural cooperatives have a total market share of approximately 60%, as regards production and marketing of basic agricultural products and an estimated 50% in the supply of inputs.

*En Europa las cooperativas agrícolas tienen una participación total en el mercado de aproximadamente el 60% en lo que se refiere a la elaboración y comercialización de productos básicos agrícolas y un 50% estimado en el abastecimiento de insumos.*

66....Variables: In New Zealand, the co-operatives control all the stages in the agricultural distribution and production chain, and market share is greater than 75%, while market share for consumer cooperatives that they occupy in the distribution of retail foods is 60%.

*En Nueva Zelanda las cooperativas dominan todas las etapas de la cadena de producción y distribución agrícola, y su participación en el mercado es superior al 75%, en tanto que la participación en el mercado de las cooperativas de consumo, que se ocupan de la distribución de alimentos al por menor, es del 60%.*

67....Variable: In Brazil, cooperatives accounted for 37.2% of agricultural GDP and 5.4% of total GDP in 2009.

*En Brasil corresponde a las cooperativas el 37,2% del PIB agrícola y el 5,4% del PIB total en 2009.*

68....Variable: In 2009, the 8124 cooperatives in Columbia accounted for 4.96% of national GDP.

*En 2009 correspondió a las 8.124 cooperativas de Colombia un 4,96% del PIB nacional.*

69....Variable: In Kenya, the savings and loans cooperatives, the biggest in Africa, have assets of 2700 million dollars, which represents 31% of gross national savings.

*En Kenya las cooperativas de ahorros y préstamos, las mayores de África, tienen activos de 2.700 millones de dólares, que representan el 31% de ahorro nacional bruto.*

70....Variable: In Mauritius, the agricultural sector cooperatives represent more than 60% of national production in the food crop sector.

*En Mauricio las cooperativas del sector agrícola representan más del 60% de la producción nacional en el sector de los cultivos alimentarios.*

71....What other development(s) might impact future business organizations developments with impact on cooperatives?

*¿Qué otros desarrollos podrían afectar los progresos de las organizaciones empresariales del futuro con impacto en las cooperativas?"*



72....What other Variables should be considered when assessing the trends for cooperatives?  
¿Qué otras Variables deben ser consideradas al determinar las tendencias para las cooperativas?

## **Future of Business Organisations**

Delphi on the Future of Business Organisations: Cooperativism and other Models

## **Futuro de las Organizaciones Empresariales**

Delphi Sobre el Futuro de las Organizaciones Empresariales: Cooperativismo y otros Modelos

### **Explanations and Background/ Explicaciones y Antecedentes**

[English](#)

[Español](#)

### **English**

DELPHI QUESTIONNAIRE ON THE FUTURE OF BUSINESS ORGANISATIONS:  
COOPERATIVISM AND OTHER MODELS

INTRODUCTION TO THE INTERNATIONAL YEAR OF COOPERATIVES 2012

The United Nations General Assembly has declared 2012 as the International Year of Cooperatives, with the following main objectives:

GENERIC OBJECTIVES

CONCRETE OBJECTIVES

Increase awareness

- Increase public awareness about cooperatives and their contributions to socio-economic development and the achievement of the Millennium Development Goals

Promote growth

- Promote the formation and growth of co-operatives among individuals and institutions to address common economic needs and for socio-economic empowerment

Establish appropriate policies

- Encourage Governments and regulatory bodies to establish policies, laws and regulation conducive to co-operative formation and growth.

The United Nations General Assembly invites Member States to set up national committees responsible for promoting activities related to the preparation and observance of the IYC. Experience from previous international years indicates that participation of strong National Committees is essential to the success of the IYC. The national committees should be inclusive and envisioned to be composed of local governments, UN country teams, cooperative movement representatives, private sector leaders, and civil society organisations.

The international Co-operative Alliance has been a major cooperative partner in support of the IYC. ICA is an important partner and will highlight the activities of an estimated 1 billion cooperative members, how they benefit from cooperatives, and how cooperatives contribute to economic and social development.

This DELPHI study is being carried out within the framework of the International Year of Cooperatives 2012, as research that will stimulate debate and reflection on the future of business organisations in general and on cooperatives in particular, in order to be able to determine key factors for a future cooperative model.

## BACKGROUND

### Definition

A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.

### Values

Co-operatives are based on the values of self-help, self-responsibility, democracy, equality, equity and solidarity. In the tradition of their founders, co-operative members believe in the ethical values of honesty, openness, social responsibility and caring for others.

### Principles

The co-operative principles are guidelines by which co-operatives put their values into practice.

#### 1st Principle: Voluntary and Open Membership

Co-operatives are voluntary organisations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.

#### 2nd Principle: Democratic Member Control

Co-operatives are democratic organisations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary co-operatives members have equal voting rights (one member, one vote) and co-operatives at other levels are also organised in a democratic manner.

#### 3rd Principle: Member Economic Participation

Members contribute equitably to, and democratically control, the capital of their co-operative. At least part of that capital is usually the common property of the co-operative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all of the following purposes: developing their co-operative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transactions with the co-operative; and supporting other activities approved by the membership.

#### 4th Principle: Autonomy and Independence

Co-operatives are autonomous, self-help organisations controlled by their members. If they enter to agreements with other organisations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their co-operative autonomy.

#### 5th Principle: Education, Training and Information

Co-operatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their co-operatives. They inform the general public - particularly young people and opinion leaders - about the nature and benefits of co-operation.

#### 6th Principle: Co-operation among Co-operatives

Co-operatives serve their members most effectively and strengthen the co-operative movement by working together through local, national, regional and international structures.

#### 7th Principle: Concern for Community

Co-operatives work for the sustainable development of their communities through policies approved by their members.

The United Nations General Assembly Resolution A/RES/64/136 encourages all member States, the United Nations and all relevant stakeholders to take advantage of the IYC to promote cooperatives and raise awareness of their contribution to social and economic development and promote the formation and growth of cooperatives.

### OBJECTIVE AND SCOPE OF THE DELPHI STUDY

The main objective of this Delphi study is to identify the key factors relating to the future of business organisations in general and of cooperatives in particular, and to validate, through a panel of international experts, the hypotheses for the most probable future evolution of these factors over the long term.

The scope of the content of this Delphi study on the future of organisations extends to all those critical factors that may relate to the future of business organisations in general and cooperatives in particular.

As regards the scope of the participants, the study is open to both international experts in the subject, through the Millennium Project Nodes network at a global level and international cooperative networks (AIC, etc), as well as major stakeholders at an international level who have connections with the cooperative world or are linked to AIC and government entities.

The aim of the Delphi method is to highlight differences of opinion and develop a consensus on certain topics, by putting questions to experts with the use of successive questionnaires. The most frequent objective of Delphi studies is to provide clarity to experts in areas of uncertainty in order to assist in decision making.

There have been various versions of the technique, here we will use the one that has been most used within the Millennium Project framework, the "Real Time Delphi". In the classic Delphi methods, judgements made in one round are fed back to the participants in subsequent rounds. The Real Time Delphi, on the other hand, does not have rounds and the generated responses are fed back to the participants in real time. As in the classic Delphi, the participants remain anonymous to one another and may omit any question they wish. There anonymity is preserved and none of the responses will be attributed to anyone.

## PROPOSAL OF FIELDS AND VARIABLES

The trend analysis carried out prior to this survey describes a future in which significant changes and mutations will continue to take place in the economic world in general and, therefore, in the organisation and company environment in particular. Variables relevant to the future of organisations and companies are numerous, but the most important identified in the trend analysis are indicated below, grouped in the following fields:

### FIELD 1: ENVIRONMENT AND MARKETS:

1. GLOBALISATION
2. GAP BETWEEN RICH AND POOR (NEEDS, ETC.)
3. REGULATION
4. PUBLIC-PRIVATE PARTNERSHIPS
5. FUTURE SECTORS (ENERGY, AGRICULTURE, CONSUMPTION, FINANCIAL, ETC.)
6. GEOGRAPHICAL MARKETS: DEVELOPED COUNTRIES, BRIC COUNTRIES, "NEXT ELEVEN", ETC.

### FIELD 2: THE COMPANY:

7. NON FINANCIAL MANAGEMENT FACTORS
8. FINANCIAL MANAGEMENT FACTORS
9. INTRA/ENTREPRENEURSHIP
10. OUTSOURCING, INTERNATIONALISATION AND POSITION IN VALUE CHAIN

11. MANAGEMENT/CORPORATE GOVERNANCE
12. WORKER PARTICIPATION MODEL
13. CSR
14. MANAGEMENT OF CUSTOMER RELATIONSHIPS
15. "NETWORKED BUSINESS" MODEL
16. TECHNOLOGICAL DEVELOPMENT
17. INNOVATION MODEL

#### FIELD 3: JOB MARKET

18. EMPLOYMENT (VOLUME AND GROWTH)
19. CONCILIATION
20. EQUALITY (EMPOWERMENT)
21. MOBILITY AND MANAGEMENT OF MULTICULTURALISM
22. MANAGEMENT OF INTERGENERATIONAL DIVERSITY
23. BENEFITS AND INCENTIVES
24. ATTRACTING AND RETAINING TALENT
25. KEY POSTS AND QUALIFICATION REQUIREMENTS

#### FIELD 4: QUANTITATIVE VARIABLES

For each one of these variables, a series of hypotheses for the future have been formulated (to 2020-2030), these are used as the basis for the Delphi questionnaire presented below.

When formulating the hypotheses, a documentary analysis was made of the main existing research and studies from sources relating to each one of the analysed variables, only hypotheses that were documented in those studies have been included, so avoiding untested hypotheses. This means that the hypotheses may be somewhat limited in some cases, given that the reliability of the sources has been prioritised over the exhaustiveness of its scope, although the participants have the chance to enrich these scopes by making contributions and points in the comments section provided for each question.

### **Español**

#### **CUESTIONARIO DELPHI SOBRE EL FUTURO DE LAS ORGANIZACIONES EMPRESARIALES: COOPERATIVISMO Y OTROS MODELOS**

#### INTRODUCCIÓN AL AÑO INTERNACIONAL DE LAS COOPERATIVAS 2012

La Organización de las Naciones Unidas (ONU) ha proclamado 2012 como Año Internacional de las Cooperativas a nivel mundial, con los siguientes objetivos:

#### OBJETIVOS GENÉRICOS

## OBJETIVOS CONCRETOS

### Aumentar la conciencia

- Crear mayor conciencia del público sobre la contribución de las cooperativas al desarrollo económico y social, y al logro de los Objetivos de Desarrollo del Milenio.

### Promover el crecimiento

- Fomentar la constitución y el crecimiento de cooperativas, compuestas de personas e instituciones, para abordar sus necesidades económicas mutuas además de lograr una plena participación económica y social

### Establecer políticas apropiadas

- Alentar a los gobiernos y organismos reguladores a implementar políticas, leyes y normativas que propicien la constitución y el crecimiento de las cooperativas.

Las Naciones Unidas invitaron a los Gobiernos para establecer un comité nacional que, de manera conjunta con todas las partes interesadas, incluyendo las cooperativas, las Naciones Unidas y la sociedad civil, coordinen en el ámbito nacional las actividades para la preparación y celebración del Año Internacional de las Cooperativas 2012.

La Alianza Cooperativa Internacional (ACI) se constituye como un socio cooperativo principal en apoyo al Año Internacional de las Cooperativas. ACI es un socio importante y destacará las actividades de los 1.000 millones de miembros cooperativos que se le estiman, cómo se benefician por ser cooperativas y cómo las cooperativas contribuyen al desarrollo económico y social.

El presente estudio DELPHI se realiza en el marco del Año Internacional de las Cooperativas 2012, como una investigación que promueva el debate y la reflexión sobre el futuro de las organizaciones empresariales en general y sobre las cooperativas en particular, de cara a poder determinar los factores clave del modelo de las cooperativas del futuro.

## ANTECEDENTES

### Definición

Una cooperativa es una asociación autónoma de personas que se han unido de forma voluntaria para satisfacer sus necesidades y aspiraciones económicas, sociales y culturales en común mediante una empresa de propiedad conjunta y de gestión democrática.

### Valores

Las cooperativas están basadas en los valores de la autoayuda, la autorresponsabilidad, la democracia, la igualdad, la equidad y la solidaridad. En la tradición de sus fundadores, los socios

cooperativos hacen suyos los valores éticos de la honestidad, la transparencia, la responsabilidad y la vocación social.

#### Principios

Los principios cooperativos son pautas mediante las cuales las cooperativas ponen en práctica sus valores.

#### Primer principio: adhesión voluntaria y abierta

Las cooperativas son organizaciones voluntarias, abiertas a todas las personas capaces de utilizar sus servicios y dispuestas a aceptar las responsabilidades de ser socio, sin discriminación social, política, religiosa, racial o de sexo.

#### Segundo principio: gestión democrática por parte de los socios

Las cooperativas son organizaciones gestionadas democráticamente por los socios, los cuales participan activamente en la fijación de sus políticas y en la toma de decisiones. Los hombres y mujeres elegidos para representar y gestionar las cooperativas son responsables ante los socios. En las cooperativas de primer grado, los socios tienen iguales derechos de voto (un socio, un voto), y las cooperativas de otros grados están también organizadas de forma democrática.

#### Tercer principio: participación económica de los socios

Los socios contribuyen equitativamente al capital de sus cooperativas y lo gestionan de forma democrática. Por lo menos parte de ese capital normalmente es propiedad común de la cooperativa. Normalmente, los socios reciben una compensación, si la hay, limitada sobre el capital entregado como condición para ser socio. Los socios asignan los excedentes para todos o alguno de los siguientes fines: el desarrollo de su cooperativa posiblemente mediante el establecimiento de reservas, de las cuales una parte por lo menos serían irreparables; beneficiando a los socios en proporción a sus operaciones con la cooperativa; y el apoyo de otras actividades aprobadas por los socios.

#### Cuarto principio: autonomía e independencia

Las cooperativas son organizaciones autónomas de autoayuda, gestionadas por sus socios. Si firman acuerdos con otras organizaciones, incluidos los gobiernos, o si consiguen capital de fuentes externas, lo hacen en términos que aseguren el control democrático por parte de sus socios y mantengan su autonomía cooperativa.

#### Quinto principio: educación, formación e información

Las cooperativas proporcionan educación y formación a los socios, a los representantes elegidos, a los directivos y a los empleados para que puedan contribuir de forma eficaz al desarrollo de sus cooperativas. Ellas informan al gran público, especialmente a los jóvenes y los líderes de opinión, de la naturaleza y beneficios de la cooperación.

#### Sexto principio: cooperación entre cooperativas

Las cooperativas sirven a sus socios lo más eficazmente posible y fortalecen el movimiento cooperativo trabajando conjuntamente mediante estructuras locales, nacionales, regionales e internacionales.

Séptimo principio: interés por la comunidad

Las cooperativas trabajan para conseguir el desarrollo sostenible de sus comunidades mediante políticas aprobadas por sus socios.

La Asamblea General de las Naciones Unidas, mediante su resolución 64/136, de 18 de diciembre de 2009, alienta a todos los Estados Miembros, así como a las Naciones Unidas y a todas las demás instancias pertinentes, a que aprovechen el Año Internacional de las Cooperativas para promover las cooperativas y crear mayor conciencia sobre su contribución al desarrollo económico y social.

## OBJETIVO Y ALCANCE DEL ESTUDIO DELPHI

El objetivo principal de este estudio Delphi es identificar los factores clave sobre el futuro de las organizaciones empresariales en general y de las cooperativas en particular y ratificar por parte de un panel de expertos internacionales las hipótesis de evolución futura más probables para dichos factores, a largo plazo.

El alcance de este estudio Delphi sobre el futuro de las organizaciones se extiende en sus contenidos a todos aquellos factores críticos que puedan estar relacionados con el futuro de las organizaciones empresariales en general y de las cooperativas en particular.

En cuanto al alcance de los participantes, el estudio se abre tanto a expertos internacionales en la materia a través de la red de Nodos del Proyecto Millennium a nivel mundial y redes internacionales de cooperativismo (AIC,...), como a agentes relevantes a nivel internacional que tengan relación con el mundo cooperativo o estén vinculados a AIC y las entidades gubernamentales.

El método Delphi tiene como finalidad poner de manifiesto convergencias de opinión y hacer emerger ciertos consensos en torno a temas precisos, mediante preguntas a expertos por medio de cuestionarios sucesivos. El objetivo más frecuente de los estudios Delphi es el de aportar claridad a los expertos sobre zonas de incertidumbre a fin de contribuir a la toma de decisiones.

La técnica ha conocido diferentes versiones, nosotros utilizaremos aquí la que ha sido más utilizada en el marco del Proyecto MILLENNIUM, es decir, la denominada “Real Time Delphi”. En las Delphi clásicas, los juicios recogidos en una ronda son retroalimentados a los participantes en rondas subsiguientes. Por el contrario, las Delphi en Tiempo Real no tienen rondas y las respuestas generadas son retroalimentadas a los participantes en tiempo real. Como en la Delphi clásica, los participantes permanecen anónimos unos con otros y pueden omitir cualquier pregunta que deseen. Se preserva el anonimato y ninguna de las respuestas será atribuida a nadie.

## PROPUESTA DE ÁMBITOS Y VARIABLES

El análisis de tendencias realizado previo a esta encuesta dibuja un futuro en el que continuarán las importantes transformaciones y mutaciones que se están produciendo en el mundo económico en general y por ende, en el entorno de las organizaciones y las empresas en particular. Las



variables relevantes para el futuro de las organizaciones y empresas son numerosas, pero las más importantes que se han identificado en el análisis de tendencias se señalan a continuación, en función de los siguientes ámbitos:

#### ÁMBITO 1: ENTORNO Y MERCADOS:

1. GLOBALIZACIÓN
2. BRECHA ENTRE RICOS Y POBRES (NECESIDADES,...)
3. REGULACIÓN
4. PARTENARIADOS PÚBLICO-PRIVADOS
5. SECTORES DE FUTURO (ENERGÍA, AGRO, CONSUMO, FINANCIERO,...)
6. MERCADOS GEOGRÁFICOS: PAÍSES DESARROLLADOS, PAÍSES BRIC, “NEXT ELEVEN”,...

#### ÁMBITO 2: LA EMPRESA:

7. GESTIÓN FACTORES NO FINANCIEROS
8. GESTIÓN FACTORES FINANCIEROS
9. EMPRENDIZAJE (INTRA E INTER EMPRENDIZAJE)
10. OUTSOURCING, INTERNACIONALIZACIÓN Y POSICIÓN EN CADENA DE VALOR
11. GESTIÓN / GOBERNANZA CORPORATIVA
12. MODELO DE PARTICIPACIÓN DE LOS TRABAJADORES
13. RSE
14. GESTIÓN DE LA RELACION CON LOS CLIENTES
15. EL MODELO DE LA “EMPRESA EN RED”
16. DESARROLLO TECNOLÓGICO
17. MODELO DE INNOVACIÓN

#### ÁMBITO 3: MERCADO DE TRABAJO

18. EL EMPLEO (VOLUMEN Y CRECIMIENTO)
19. CONCILIACIÓN
20. IGUALDAD (EMPODERAMIENTO)
21. MOVILIDAD Y GESTIÓN DE LA MULTICULTURALIDAD
22. GESTIÓN DE LA DIVERSIDAD INTERGENERACIONAL
23. BENEFICIOS E INCENTIVOS
24. ATRACCIÓN Y RETENCIÓN DEL TALENTO
25. PUESTOS CLAVE Y NECESIDADES DE CUALIFICACIÓN

#### ÁMBITO 4: VARIABLES CUANTITATIVAS

Para cada uno de esas variables, se han formulado una serie de hipótesis de futuro (a 2020-2030), que son la base del cuestionario Delphi a expertos que se presenta a continuación.

A la hora de formular las hipótesis, se ha realizado un análisis documental de las principales investigaciones y estudios existentes de fuentes relevantes en cada una de las variables analizadas, de manera que sólo se han incluido hipótesis que estuvieran documentadas en tales

estudios, evitando así hipótesis no contrastadas. Ello supone que las hipótesis pueden resultar algo limitadas en algunos casos, dado que se ha priorizado la fiabilidad de las fuentes frente a la exhaustividad de su alcance, aunque los participantes tienen la oportunidad de enriquecer estos alcances realizando aportaciones y matizaciones en el apartado de comentarios dispuesto en cada pregunta.