



# Horizon Scan

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Prepared by Institute for the Future for  
1000 Friends of Oregon  
November 2024

# Horizon Scan

No one can predict the future, but thoughtful planning is possible by examining near-term trends and identifying signals of change. These signals provide insights into shifting perceptions and responses to the world around us. This initial horizon scan aims to explore the transforming future forces likely to impact Oregon overall, and the priorities of 1000 Friends of Oregon in particular.

This scan offers five future forces of this evolving horizon, derived and synthesized from IFTF's foundational research. Each future force highlights poignant drivers and signals of change that show us, in concrete detail, just how different the future might be. They are accompanied by insight questions offered by IFTF researchers to guide 1000 Friends of Oregon in their strategy development.

The five future forces contained in this horizon scan include:

1. **TECHNOLOGY:**  
The Advent of Relational Computing
2. **SOCIAL FABRIC:**  
The Uncanny Valley of Governance
3. **POPULATIONS:**  
The Generational Transitions
4. **FUNDING:**  
The Rise of Reparative Capital
5. **MOBILITY:**  
The Nexus of Transportation and Climate

# Future Forces

**TECHNOLOGY:** The Advent of Relational Computing

**SOCIAL FABRIC:** The Uncanny Valley of Governance

**POPULATIONS:** The Generational Transitions

**FUNDING:** The Rise of Reparative Capital

**MOBILITY:** The Nexus of Transportation and Climate

# TECHNOLOGY: The Advent of Relational Computing

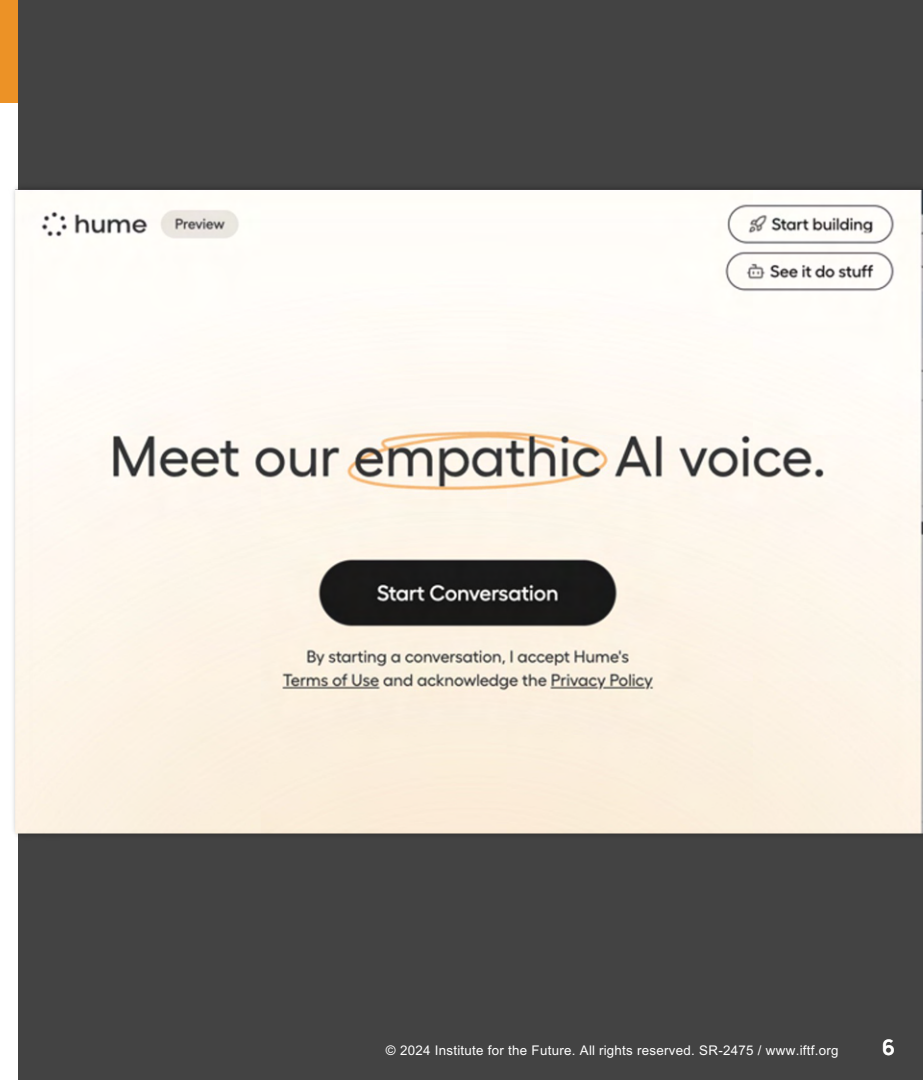
# Drivers of Change

- **Rapid Adoption of Generative AI** - Chat GPT has the fastest adoption in history, garnering 100 million users in just its first 2 months. A Pew study from March 2024 found that 43% of 18-29 year olds in the US (and 23% of American adults overall) have used gen AI tools like ChatGPT.
- **Acceleration of Job Transformations** - The International Monetary Fund anticipates that up to 60% of jobs in advanced economies are likely to be significantly impacted by AI in the near future, including so-called “white collar” work.
- **Proliferation of Bots** - Forbes shares that nearly half of the traffic on the Internet is from bots, and Stanford notes that Large Language Models (LLMs) have enabled robots to interact more effectively with the real world, including asking questions.
- **Surging Energy Use** - The International Energy Agency anticipates a doubling of aggregate energy demand in the next few years, driven by emerging technologies.

# Hume.AI can talk fluidly and respond to your emotions

**WHAT?** Hume.AI is one of the many new AI platforms to launch in 2024 that can engage users in natural human language about any topic they desire. What differentiates Hume is its focus on granular analysis of the emotional content of the human participant, derived from their speech, tone of voice, and facial expressions.

**SO WHAT?** Long promised by science fiction, we see in Hume the realization of the dream of computers that can understand and adapt to the emotional state of their users. As intelligent agents proliferate, they will have access not just to a high degree of our data, but will be able to contextually adapt their approaches and responses based on the mood and inflections of their users.



### DoNotPay App works on your behalf

**WHAT?** Dubbed “your AI consumer champion,” DoNotPay uses AI to complete tasks like appealing parking tickets, stopping bank fees, optimizing privacy and datasharing protections, and avoiding robocallers.

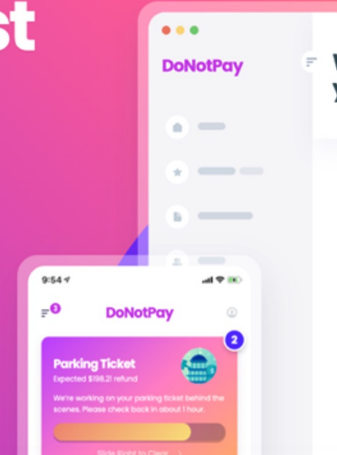
**SO WHAT?** People will increasingly leverage AI to help them navigate legal and bureaucratic contexts. This has implications for citizenship and our relationships with government. Just look at the the subhead of this *Today* news segment: “App that helps you fight...city hall.” We will have relationships with bots who act on our behalf—and those bots will soon form relationships with each other.

# The World's First Robot Lawyer

The DoNotPay app is the home of the world's first robot lawyer. Fight corporations, beat bureaucracy and sue anyone at the press of a button.

Sign Up/Login

By signing up or signing in, you are agreeing to [DoNotPay's Terms and Conditions](#) and for us to send messages to the phone number or email provided. These terms contain an arbitration agreement; please read them carefully. DoNotPay is not a law firm and is not licensed to practice law. DoNotPay provides a platform for legal



# National Zoning Atlas - A machine learning project

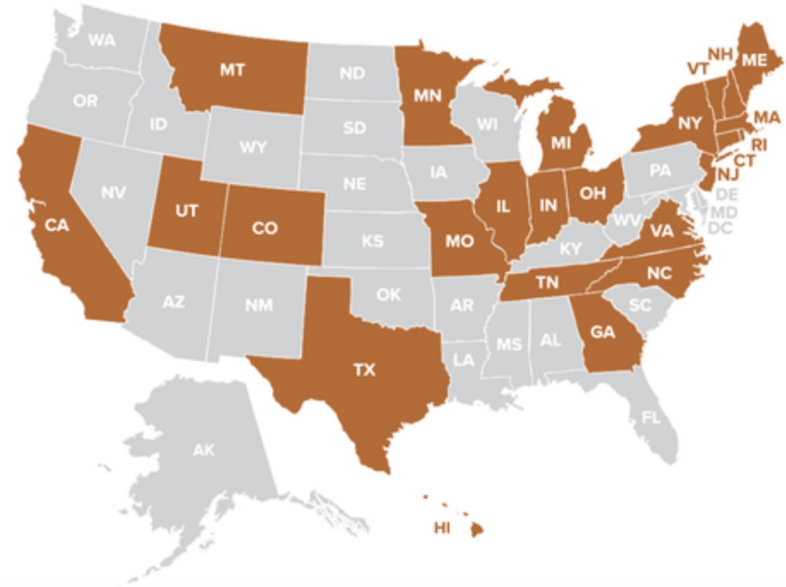
**WHAT?** The National Zoning Atlas, which started in Connecticut and now spans 60 institutions nationally, is a growing effort to use AI to digitize, demystify, and democratize information currently hidden within ~30,000 US. zoning codes. It collects local, parcel-level data about housing zoning enacted at the local level—from minimum lot sizes, to parking requirements, to height limits.

**SO WHAT?** The goal of the National Zoning Atlas is to assemble a composite picture across multiple local sources, to make them more understandable, and ultimately to decrease the racial and class segregation perpetuated by racist zoning policies.

AI use includes: text analysis (identifying zoning district names in documents), natural language processing, optical character recognition, and data validation rules to speed up manual checks.

# NATIONAL ZONING ATLAS

States With Zoning Atlas Projects Underway





How will **job displacement** in 2034 due to AI impact *land use patterns* – both conservation and development, as the world of work transforms?

In a 2034 where there is a premium placed on **real human interactions**, what role can 1000 Friends of Oregon play?

Discussion: *Foresight to Insight*

How will AI-powered projects  
like the **National Zoning Atlas**  
enable the work you do?

# SOCIAL FABRIC: The Uncanny Valley of Governance

# Drivers of Change

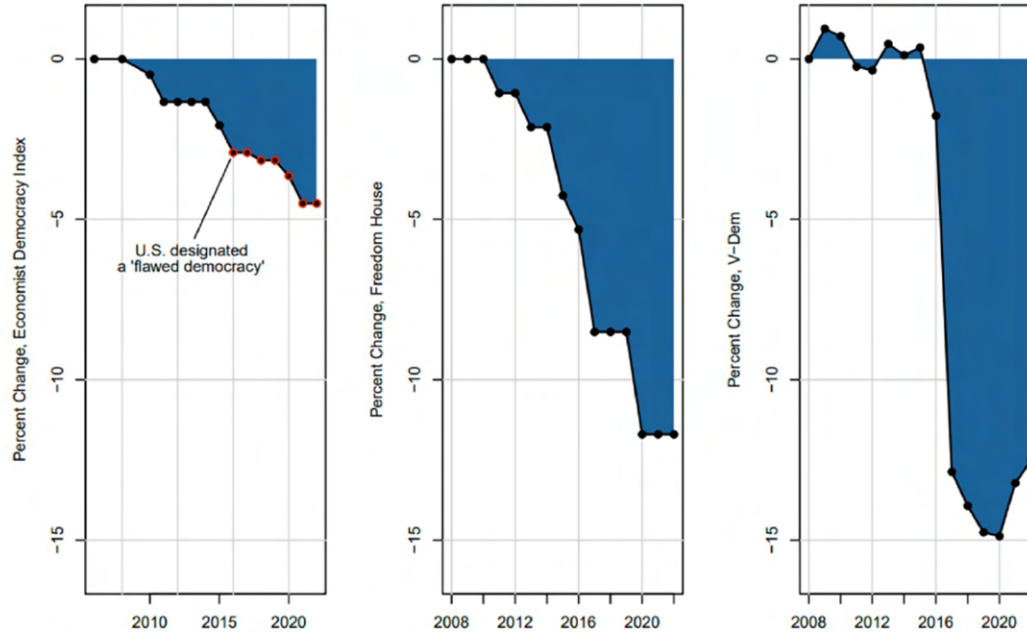
- **Polarization / Extremism** - Threats and acts of political violence are rising, and high numbers of respondents in surveys agree that political violence might be necessary.
- **Disinformation / Deep Fakes** - Social media and more mainstream outlets are sharing disinformation and deep fakes at alarming rates. Norms on sharing disinformation are waning.
- **Economic Inequality** - Wide gaps between rich and poor often presage social turmoil.
- **Money in Politics (Corruption, Dark Money, Foreign Influence)** - Dark money groups and bribery have infected all branches and scales of government.
- **Gender Divide in Politics** - Men and women have drastically diverged in ideology over the last 10 years, with women becoming more liberal and men more conservative.
- **Polycrisis: Extreme Weather, Resource Strains, Mass Displacement** - External forces for social turbulence are rising. Polycrisis occurs when multiple crises are happening at the same time or in close succession and they amplify each other.

# Analysis of “Full Democracy” to “Flawed Democracy”



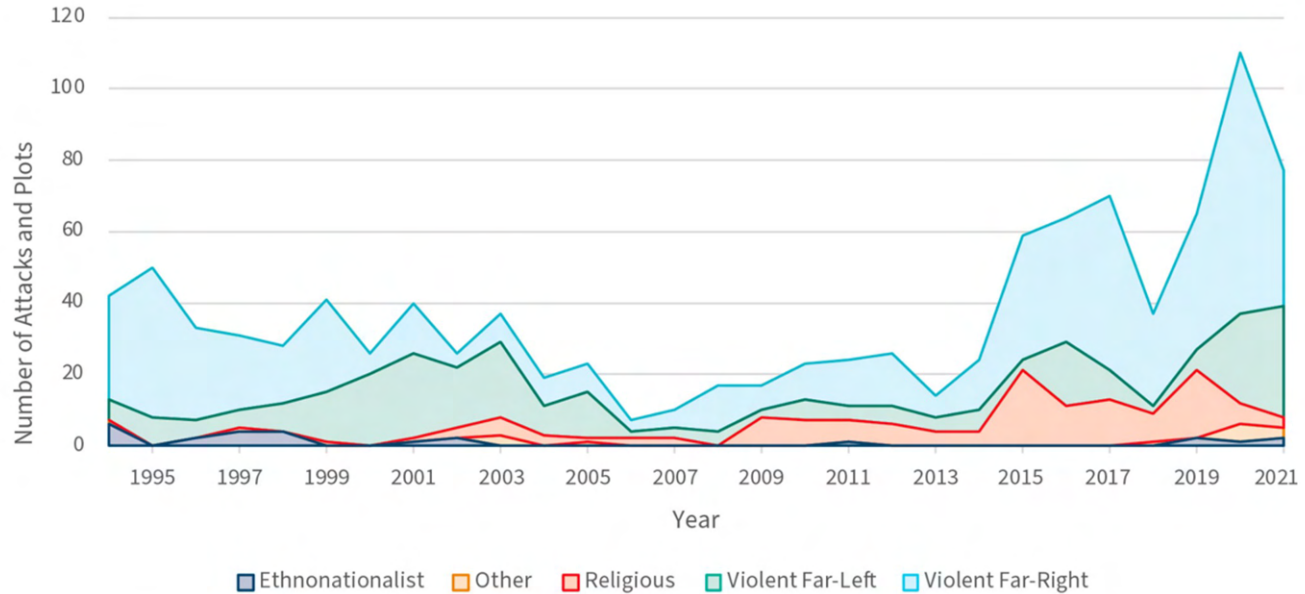
FIGURE 1

Experts agree that U.S. democracy is in decline



Source: Economist Intelligence Unit “Democracy Index”, V-Dem “Liberal Democracy Index”, and Freedom House “Freedom in the World.”

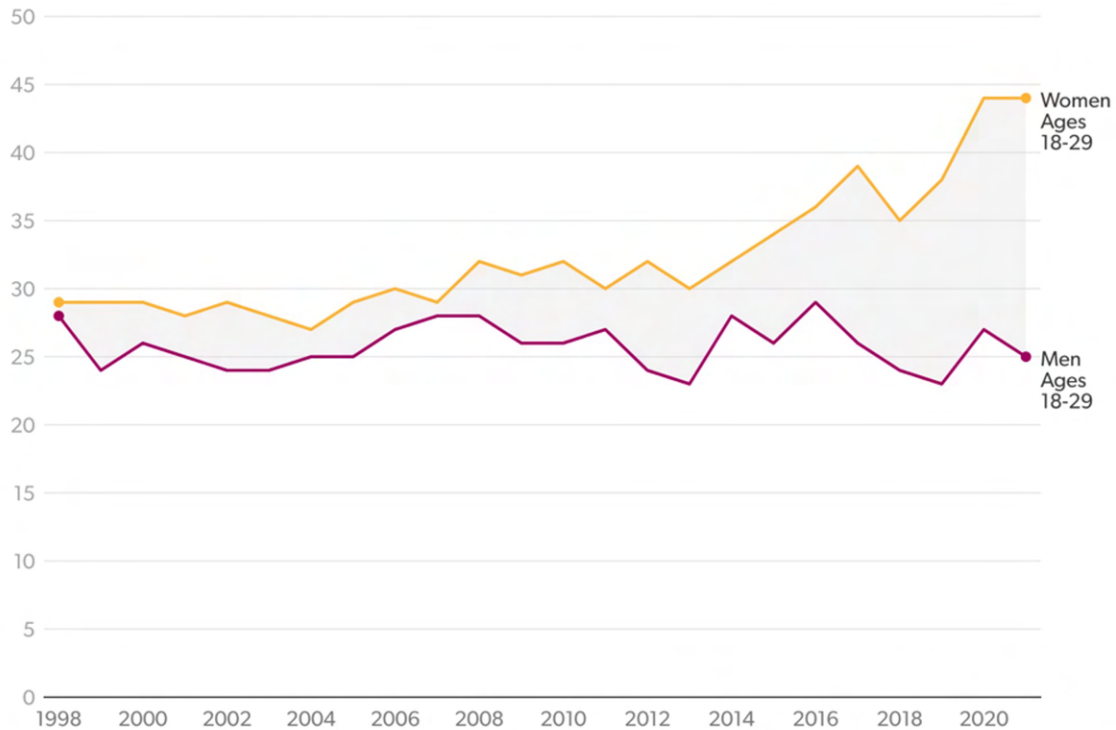
**Figure 5: U.S. Terrorist Attacks and Plots by Perpetrator Orientation, 1994–2021**



Source: Data compiled by CSIS Transnational Threats Project.

## Young Women are Much More Liberal than Young Men

Percentage of men and women between ages 18 to 29 who identify as liberal



Source: Gallup Poll Social Series, 1998-2021



# Deschutes County Civic Assembly on Youth Homelessness

**WHAT?** Civic leaders in central Oregon have launched an initiative to bring citizens into a series of civic assemblies to address challenges in the region. The first meetings are happening in September and October 2024, with a goal of recommending policies to tackle youth homelessness.

**SO WHAT?** Civic Assemblies have been a growing movement around the world. These assemblies bring citizens into the political process in a more concerted way, enhancing democratic participation and building civic muscle.

“We’ve already seen a long history of success using the Civic Assembly model in the US – including a wave of [Citizens’ Juries in the 1970s](#), [Oregon’s very own Citizens’ Initiative Review](#), and recent local Assemblies in [Oregon](#) and [California](#),” said Linn Davis, Program Co-Director at Healthy Democracy. “When we bring new voices into public decision making and empower people with the right process, these processes produce political breakthroughs that we rarely see in traditional public engagement.”

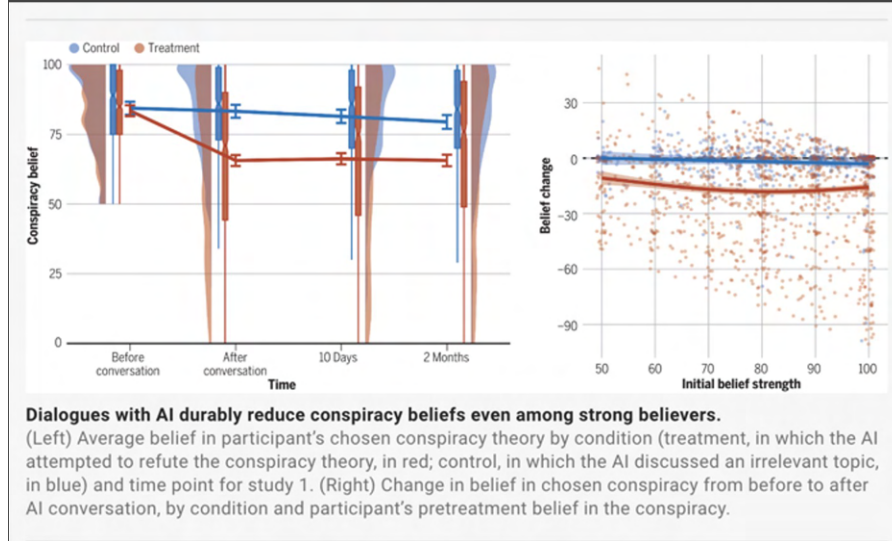
Source: <https://www.linkedin.com/pulse/launching-first-of-its-kind-civic-assembly-deschutes-county-nyzpc/>



## Durably reducing conspiracy beliefs through dialogues with AI

**WHAT?** Researchers have used AI chatbots to dislodge conspiratorial beliefs among study participants. This change in opinion was seen to last for months after the original engagement with the chatbot.

**SO WHAT?** AI Chatbots have been called super-persuaders, because of their ability to craft arguments in authoritative and personalized ways. This is usually seen as a threat, and indeed it is, but the power of these tools to nudge people away from false or conspiratorial beliefs shows some promise for how they might be used for individual and social benefit.



Source: <https://www.science.org/doi/10.1126/science.adq1814>

Discussion: *Foresight to Insight*

How will 1000 Friends of Oregon  
**influence decisions** of voters and  
policy-makers in a 2034 rife with  
disinformation?

What does the **shifting gender divide (and racial realignment)** in political affiliation mean for the future membership of 1000 Friends of Oregon?

What **communications tools** and partners will you need in 2034 to pierce through the urgency of *polycrisis*, so that you deliver on your mission?

Discussion: *Foresight to Insight*

How will you respond to the  
**coming attacks** on civil society  
and civil society organizations?

# POPULATIONS: The Generational Transitions

# Drivers of Change

- **Gen Alphas Adulting** - In 2034, the oldest members of Generation Alpha will be 24. The COVID-19 pandemic hit at a formative childhood age, and Gen Alphas served as guinea pigs in new, tech-mediated social norms around school, health, and play. An estimated two billion people were born between 2010-2024, making them the largest generation in history. Globally, one in three internet users is a child. Over 50 million Gen Alphas live in the United States and fewer than half of them identify as white.
- **Climate Migration** - The UN's International Office of Migration estimates that the world will see as many as 1 billion climate migrants by 2050. The U.S. Department of Housing and Urban Development recently released a Climate Resilience Implementation Guide on "Community-Driven Relocation." Notably, the conversations about human migration and other forms of biodiversity are still not well-connected.
- **Aging in Place** - In a decade of tremendous wealth transfer, the 85+ population in the US is expected to increase from 6.7 million in 2020 to 14.4 million in 2040, more than doubling. Many prefer to age in place (AARP estimates 77% of adults 50+). At the same time, we'll see a tremendous wealth transfer (estimated to be \$80+ trillion).



## Climate migration, climate gentrification and displacement

**WHAT?** The goal of the Receiving Geography Guide by the PLACE (Proactive Leadership Advocating for Climate & Equity) initiative, is to create a framework for communities to equitably strengthen their responses to incoming climate change migration. The guide identified 54 cities that are well-positioned to serve as receivers.

**SO WHAT?** Models of climate risk are becoming more accessible to the average person. Just like we all know how to check Purple Air for air quality during wildfires, we will soon reference this type of guide to assess climate risk.

# 1. RECEIVING GEOGRAPHY GUIDE EDITION 2, JANUARY 2023



CLIMATE RECEIVER PLACES PROJECT AT THE

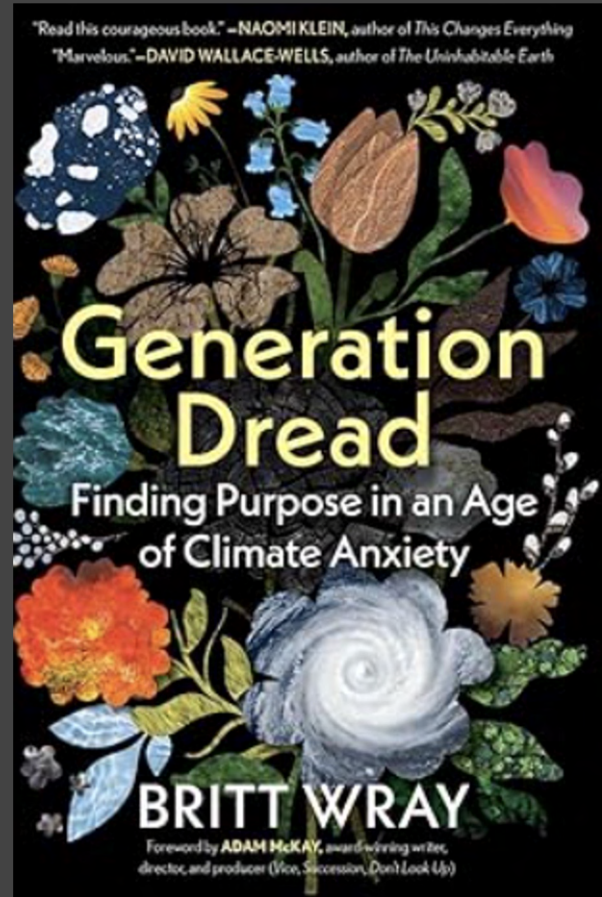


PLACE INITIATIVE

## Mainstream books on climate anxiety

**WHAT?** A book tour on college campuses across the US marked the launch of Britt Wray's book, *Generation Dread*, which unpacks concepts around eco-distress, solastalgia, climate anxiety, climate-aware therapy, and more.

**SO WHAT?** The data on physical and mental health impacts of climate change are becoming more developed. The data clearly shows that climate change impacts on health, which are linked to morbidity and mortality, are unevenly distributed.



## Daily routines go social

**WHAT?** With over 113 billion posts in 2023, “Get Ready With Me” videos comprise a significant share of content creation on TikTok and other social media platforms. The videos, often filmed in bedrooms or bathrooms, document the process by which someone gets ready for school, work, or a social event.

**SO WHAT?** Beyond product recommendations, GRWM videos offer connection and, while often contrived, an authentic, intimate moment with someone going through the steps of a daily practice (in this case, the practices of picking out outfits and doing one’s makeup).



Discussion: *Foresight to Insight*

How will 1000 Friends of Oregon effectively serve as a policy advocate in a 2034 filled with **climate anxiety**?

Discussion: *Foresight to Insight*

How will you cultivate  
**intergenerational community**  
among your members in 2034?

In a time of climate migration,  
what would it look like to design  
for **impermanence**?

# FUNDING: The Rise of Reparative Capital

# Drivers of Change

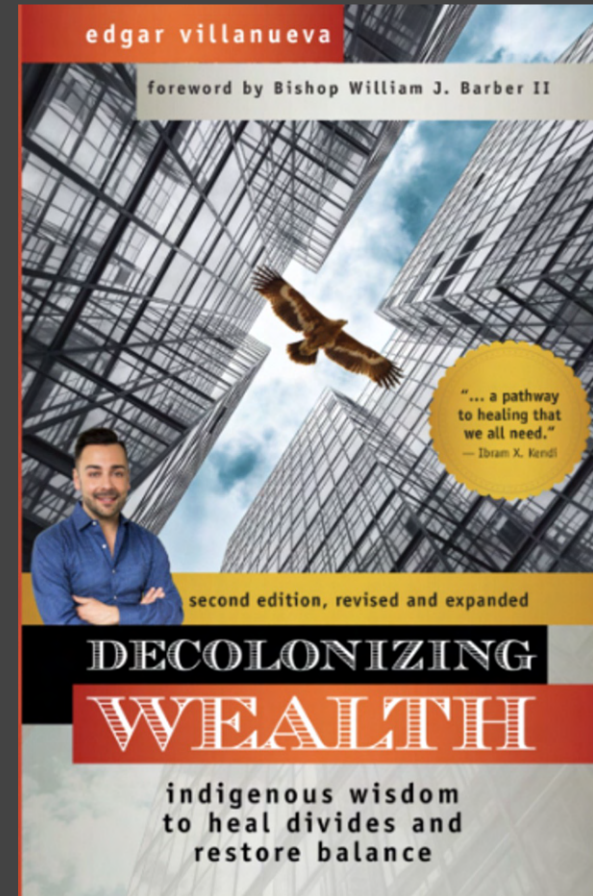
- **Rise of Reparative Capital** - Reparative philanthropy “seeks to foster reconciliation, repair and collective healing through acts of giving.” This model accompanies processes for healing and truth-telling (California Truth & Healing Council) and cash payment reparations (Evanston, Illinois).
- **“We’re All Disaster Philanthropists”** - Whether it is part of their mission or not, many philanthropic organizations are finding themselves funding along the spectrum of disaster response, mitigation, adaptation, or resilience.
- **Policy Experimentation for Universal Basic Assets** - Many organizations are thinking beyond Universal Basic Assets and experimenting with various policies in order to identify a fundamental set of resources that every person needs access to, from financial security and housing, to healthcare and education.



### Reparative capital

**WHAT?** Asking the question, “What if money was medicine?” Indigenous scholar Edgar Villanueva offers a vision of decolonizing wealth—including the banking and philanthropic sectors. Currently in its second edition, it is now complemented by a journal to help the reader “rethink their relationship with money.” The associated giving circle, Liberated Capital, has 603 members and has raised \$9.1 million.

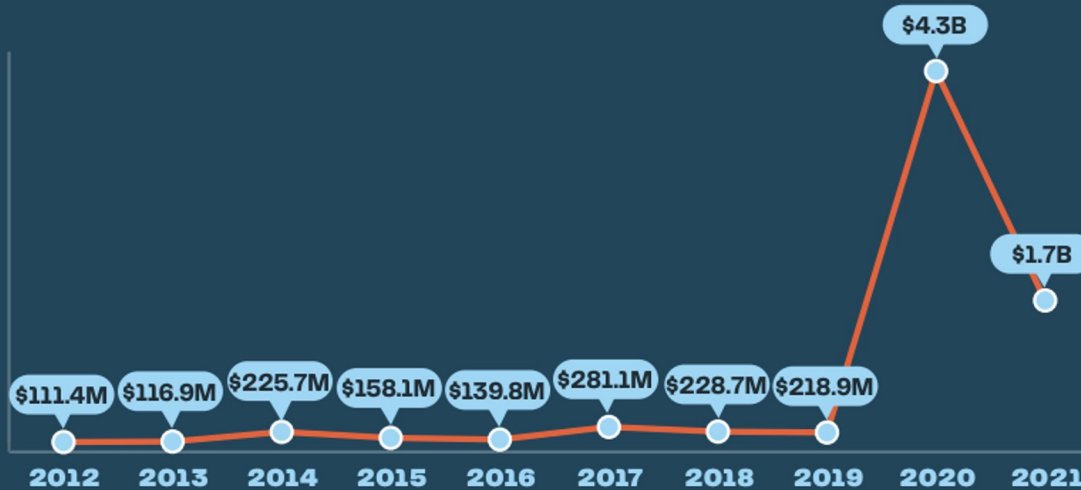
**SO WHAT?** From a land use perspective, the reparative capital movement is beginning to inform the work of the California Truth & Healing Council through the California Truth and Healing fund. The average donation to the fund is \$804. So far, over a million dollars have been granted to over 95 organizations, with over 500,000 Native individuals impacted.





## 2023 State of Disaster Philanthropy report

### FUNDING FOR DISASTERS BY THE TOP 1000 LARGEST U.S. FOUNDATIONS, 2012–2021



**THE 10-YEAR TREND** is based on Candid's Foundation 1000, which contains grants of  $\geq$ \$10,000 by 1,000 of the largest U.S. community, corporate, independent and operating foundations. It excludes loans, grants to individuals, program- and mission-related investments, and grants from corporate giving programs, public charities and individual donors. **Epidemics, primarily COVID-19, accounted for 84% of giving in 2021.**

How might 1000 Friends of Oregon **engage funding sources** like community development entities, financial institutions, and philanthropies around land justice?

What **communications tools** and key messages will you need in 2034 to engage disaster philanthropy to look upstream?

# MOBILITY: The Nexus of Transportation and Climate

# Drivers of Change

- **Environmental Sustainability** - The increasing urgency of addressing climate change is a driver influencing the transportation mobility landscape. There is a push to reduce carbon emissions and promote sustainability, while transitioning to electric vehicles (EVs), expanding public transportation, and enhancing biking and walking infrastructure.
- **Equitable Access** - Growing awareness of social inequities, particularly in terms of transportation infrastructure, is reshaping mobility priorities in states like Oregon. Rural communities, lower-income groups, older adults, people with disabilities, and communities of color have been historically underserved by public transportation. Policies may increasingly focus on creating equitable transit networks, providing affordable, accessible options for all residents.
- **Technological Innovations in Transportation** - Advancements in transportation technology, such as autonomous vehicles, electric vehicle infrastructure, and smart city systems, are shaping the future of mobility.

# Electric Nation: Indigenous-led initiative expands EV access across Tribal lands

**WHAT?** Electric Nation is an Indigenous-led initiative connecting 23 Tribal nations in the Midwest to promote clean transportation. The \$13.9 million project will install 55 fast chargers and 60 Level 2 chargers, and expand EV access on Tribal lands across Minnesota, North Dakota, and South Dakota. The project also includes EV fleet deployment, renewable energy education, and workforce training for Tribal communities.

**SO WHAT?** Electric Nation showcases the intersection of mobility and environmental justice, as Indigenous communities lead the shift from fossil fuels. By expanding EV infrastructure, the project reduces reliance on traditional energy and supports economic empowerment through renewable energy job training. It demonstrates how EV adoption can foster inclusive, sustainable solutions for underserved communities like Tribal nations.



Source: <https://www.nrdc.org/bio/isabella-sullivan/clean-transportation-another-form-indigenous-resistance-big-oil>

# The Safe Place to Park program

**WHAT?** The Sedona City Council approved a "Safe Place to Park" program, which provides 40 designated parking spots for full-time workers in Sedona who are living in their cars. Participants would be able to use the lot from 10pm - 8am, but must vacate during daytime hours.

**SO WHAT?** The program aims to improve housing stability for Sedona's workforce, with structured support to help participants secure permanent housing. However, community pushback could lead to a public vote, potentially altering or halting the program.



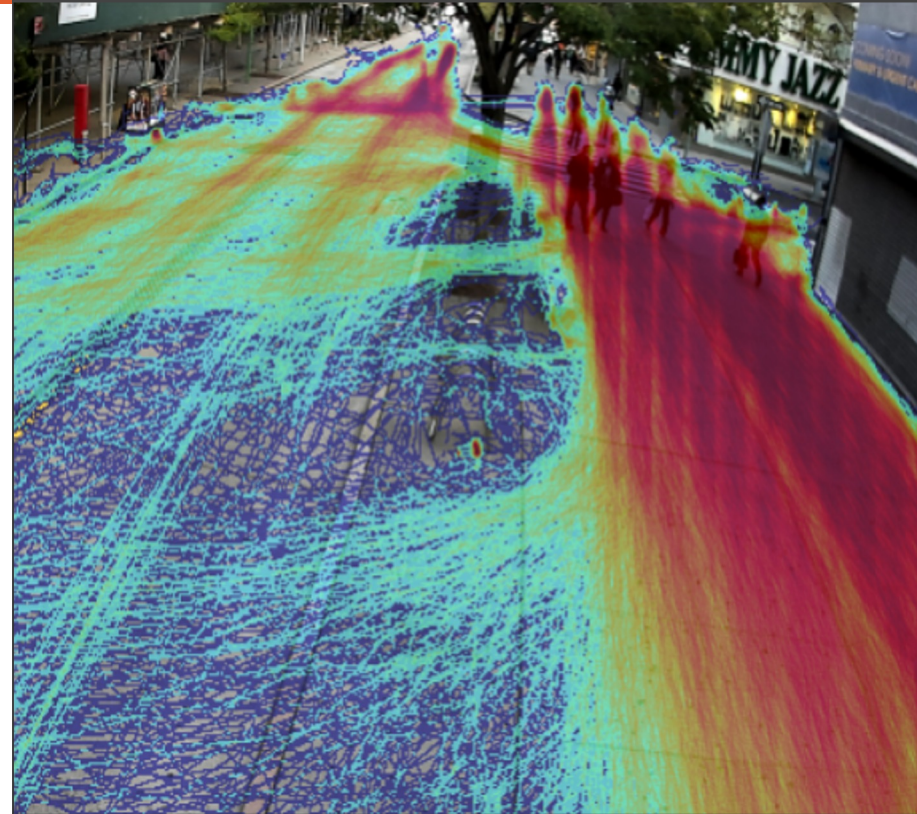
Source:  
<https://www.azcentral.com/story/news/local/arizona/2024/03/15/sedona-approves-safe-parking-for-workers-living-in-cars/72958830007/>



### Numina

**WHAT?** Numina is a computer vision sensor designed specifically for streets, providing real-time data on curb-level activity. The system anonymously collects and aggregates data on the movement and behaviors of travelers and objects, delivering insights on how things move at street level. Unlike traditional traffic management systems, which are car-centric and expensive, Numina offers a plug-and-play solution that tracks street activity to enhance safety, efficiency, and the overall experience for people in urban environments.

**SO WHAT?** By moving away from car-centric traffic management and focusing on all street users, including pedestrians and cyclists, Numina promotes more inclusive mobility options. This helps cities design safer and more accessible streets. Additionally, the real-time, data-driven insights support environmental sustainability by encouraging multimodal transportation planning and reducing vehicle congestion.



Source: <https://numina.co/solution/>

Discussion: *Foresight to Insight*

# How will Oregon manage the **transition for transportation funding** in the next decade?

How will 1000 Friends of Oregon utilize **new data and visualization tools** to make a compelling case for equity in mobility?



## 1000 Friends of Oregon

1000 Friends of Oregon works with Oregonians to enhance our shared quality of life by building livable urban and rural communities, protecting family farms and forests, and conserving natural areas. Since 1974, 1000 Friends has worked to protect and improve Oregon's unique, statewide land use planning program through education, policy advocacy, coalition building, and strategic litigation. 1000 Friends of Oregon is a 501(c)(3) nonprofit organization headquartered in Portland, Oregon.



## Institute for the Future

Institute for the Future (IFTF) is the world's leading futures organization. For over 55 years, businesses, governments, and social impact organizations have depended upon IFTF global forecasts, custom research, and foresight education and training to navigate complex change and develop future-ready strategies. IFTF methodologies and toolsets yield views of transformative possibilities across all sectors that together support a more equitable and sustainable future. Institute for the Future is a registered 501(c)(3) nonprofit organization based in Palo Alto, California. <https://iftf.org/>

### Acknowledgments

#### IFTF Research Team:

Rachel Hatch, Nathalie Lopez, Jake Dunagan, Quinault Childs, Teff Tefferra

#### IFTF Design, Editorial, and Production Team:

Jean Hagan, Robin Bogott, Julie Ericsson, Mark Frauenfelder, Trent Kuhn