the future of us_

Innovation Forum

Forum Members Insight Report

by Ant Morse – Chair | Innovation Forum

Q4 | Mar25

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> *The future interests me - I'm going to spend the rest of my life there*
>
> Mark Twain

Executive Summary

Another extraordinary quarter of technological progress brings yet more new solutions and services into an already crowded landscape, as we witness:

- Breakthroughs in AI solutions progressing from Gen AI to AI Agents to fully Agentic systems,
- A surge of entrepreneurial innovation challenging big tech, all racing to define the new frontier,
- Established providers in every sector scrambling to retrofit their offerings with AI,
- And all of this wrapped in a political trade war of shifting dynamics and global economic rollercoasters

This ongoing disruption challenges us and our teams to stay ahead of emerging developments, cut through the hype, and identify the real innovations that will deliver lasting value. Yet, in the face of such change, many are asking tough questions:

- Are we keeping up, or are we falling behind?
- Do we truly understand the technologies and shifts underway?
- How do we measure up in this fast-moving competitive environment?
- Are we aligned with evolving customer expectations?
- And how do we do all this in an uncertain regulatory landscape?

The pace is relentless. Newsfeeds overflow with announcements of technologies poised to reinvent how we work, what we deliver, and how value is created. Transformations that once seemed distant now appear imminent. It's no wonder that, for some, deeper questions arise about our skill and relevance.

And yet, amidst the noise and understandable concern, we collectively bring what many headline authors lack: **Experience** and fact that **this is not our first rodeo**. As we said in last quarter's Opinion piece: "We hold the pen." and we have done so for some time. We know not to be fooled by the headlines of hype, the polished promises, or the brochure blurbs claiming to solve all our problems. We're simply not in that time or reality. Instead, we hold firm to one of our guiding principles: moving way beyond the brochures to share our unbiased research, our candid insights, and most importantly our lived experiences to bring the complex into focus.

Let's be honest—we are also facing a much-needed reality check:

- We are swimming in a sea of chaos and tech bubbles.
- The technology is not yet as good as it claims to be.
- Robots won't take all our jobs, sure they will disrupt but they will more likely simply empower us.
- The "Magnificent 7" should be renamed the "Magnificent Swans," as they paddle to maintain relevance and revenue in equal measure… and who will come out on top.

However, our priority as a Forum remains clear: **To explore the future for our future, to demystify the complex, and to take everyone on the journey with us.** This Q4 2025 Innovation Forum report is designed to help us do just that, offering a combination of research, insights, predictions, and forum members' shared experiences and as always, our honest opinions as we make sense of the change and identify the real drivers shaping our collective future.

I'm continually grateful to you our members for your kind support, inputs and insights, your collaborations, and most of all your confidences, as we navigate this incredible period of transformation together.

Very Best

Ant

Ant Morse – Chair | Innovation Forum

Q4 Report Content_

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observing the future, for our future

Q3 Tech news

Tech Stock –Corrections or Relevance

Our views on the Magnificent 7 last quarter gained some interest, and quite understandably, as many of us hold their stocks. So, three months on, how does the landscape now look? And with economists prevailing view one purely of corrections, are we standing by our call out that the Mag 7 might not be the bankers we hoped they would be in the future?

In brief, Yes, but to stress we are not suggesting a collapse, they all have pockets deep enough to outlive us on this, but instead we are calling out a likely change around of the chairs in terms of relevance rather than wider suggestion of simply collective Tech corrections. With the main reason being that their **innovations of yesterday** are no guarantees of retaining their Mag 7 title in a world of rapidly changing tech and societal and particularly changing economic trends. Which in most cases will, at the very least, see significant impacts to their current business models and mid-term forecasts.

We feel one of the key factors here is based on the level of investments coupled with the invisible hand of competition driving a race to the bottom, of a technology barely 'off the blocks' which in turn will challenge business case ROI's. Then further impacted with seemingly **'out of sight' economic trends** such as our **'Life As A Service'** which will see the target markets available wallet spend no longer be as available, resulting in the Mag7 not only competing in the tech sector, but more so for a place on our bank statements overall.

Trump's tariffs now muddy the water in terms of us tracking our prediction, and while this will likely be balanced in the near future, it will also no doubt be blamed for performance dips we are predicting, which might be a convenient cover for them, but we will continue to track this closely and start to predict the likely winners and losers when we can see them (based on the tech they back)

Apple ADP, 23&Me - Our Data

Feb saw Apple remove **Advanced Data Protection** (ADP) feature for iCloud users in the UK following a government order under the Investigatory Powers Act, which demanded access to encrypted user data. However, services such as iCloud Keychain and Health data, remain end-to-end encrypted, but wider data including iCloud Backups (our entire phones contents) and Photos, are now less secure.

This change raises significant privacy concerns overall, as it reduces the level of protection for users' personal information, making it more susceptible to unauthorised access and potential misuse. And as technology advisors, while we can appreciate the national security here, it's important to question where this leads us in the future and what safeguards are in place to prevent further policy shifts that could open the door to broader misuse of our personal data? For example, if today it's about lawful access, could tomorrow see sensitive information, like health data being shared with third parties such as life insurance companies, potentially impacting premiums or coverage? The erosion of strong encryption doesn't just affect privacy today; it risks creating a framework where personal data could be leveraged against us in ways we can't yet foresee.

This was the topic of a lunch catch between myself and fellow Forum Member **David Clarke OBE**, which quickly moved from a restaurant to a keynote at the Cavel European Summit in London. Incredible points raised and find a summary of our conversation on Page 16.

….And then in the same quarter the DNA testing and mapping firm **23andMe** file for bankruptcy protection, raising a question over what happens to peoples DNA data in the receiverships process to liquidate this highly sensitive data set?

Tech Talk

Apple bring hearing aid features to AirPods

BYD's Super e-Platform charges 249 miles in 5mins

AI writes Genomes from scratch, in a major step towards generative biology

AI Hallucination rates fall, but still circa **12%** to **15%**

More people now watch YouTube on their TV's than on mobiles

50% Of UK online buyers have returned a product in the last 12 mths

Apple TV losing $1bn per year but investing $5bn on content

Judge Rules AI content can't be copyrighted

AI Market News_

What are the latest developments from the AI Market likely to impact our organisations, people and customers alike?

Will the battle for AI supremacy deliver true transformation and what are the wider aspect for our consideration in our own pursuit for true AI differentiation?

Bubble or not… its our move

Since the launch of ChatGPT in late 2022, we've witnessed an extraordinary acceleration in AI capabilities, transforming Generative AI from a novel tool into a catalyst for rethinking how businesses operate. As a forum we've grasped the basics together, and since then observed this rapid progress with a healthy balance of curiosity and caution, opting for pilot projects and controlled experiments to "test the waters." But now the landscape has shifted once again. With the rise of Agentic AI systems that not only generate but also act, decide, and orchestrate, moving to seemingly endless and interesting use cases… the game has now changed…forever.

What's also changing is expectation. From boards, investors, customers, and employees alike. There's a growing demand for businesses to articulate not just if they're exploring AI, but how they plan to embed it across their operations, services, and value propositions. Yet, this isn't a race to adopt for adoption's sake. The challenge is clear: we must strike the right balance between moving too fast, and risking missteps or fragmented efforts, and waiting too long, only to find we've missed the competitive advantage entirely, or to our point on the previous page, backing the wrong provider in this highly competitive and changing market.

This is no longer about isolated use cases or experimenting at the edges. It's about stepping up to design a comprehensive AI strategy, one that maps how intelligence will flow through every part of the business in a sustainable, value-driven way. Like a chessboard, the next phase demands deliberate, strategic moves, against the currently unknown moves and factors such as competition and regulation. Whether AI proves to be a 'bubble', or the foundation of a new era is irrelevant if we stay static. The opportunity, and risk now lies in how we navigate this balance and move from exploratory thinking to building an AI-enabled future that aligns with our core objectives. The board is set…and it's our move.

Is 'the Story of Scout' becoming a reality?

In his 2021 book **the Future of Us**, our Forum Chair Ant Morse predicted that in the not-too-distant future we would all have our own individual AI assistant that would support a range of tasks and chores in our daily lives… a concept actually born in 2015… which at the time raised many eyebrows. but recent development now move from a 'likely' to 'inevitable' driven on this quarter by two quiet but significant progressions. **Firstly, Amazon** release **Alexa +** an upgrade on Alexa moving way beyond the basic 'voice to text' search and bringing Gen AI capabilities into play along with individual family member memory features. An early step with limited features reserved for the US market until next year, but with a big roadmap of future features & services. And while this still might feel a little gimmicky, it drives a massive commercial and future relevance play for Amazon. **Secondly,** Microsoft are suggesting the return of the paperclip to give a persona to AI bots such as Co-Pilot, again, feels a bit of a gimmicky but as Agentic AI meets Gen AI and it builds out giving AI an actual face (as Ant described in the **Story of Scout** chapter in his book) this brings his concept of Personal AI ever closer and will enable a vast step change in progress of how we all use AI and technology overall. More on Agentic AI on Page 7. One to watch closely… or perhaps one to simply 'chat' to instead!

Securing & Governing AI

While we continue to test and explore the art of the possible and the practical application of AI in our organisations, many of us now move from proof of concepts to live applications, using a wide range of solutions from big tech and niche providers. And while we evolve to increased AI usage, as we do so we also massively **open up the attack surface** as a natural consequence. Bringing new considerations into play, such as how do we secure the data, the models themselves and how they're used by our people and potentially bad actors. Furthermore, how does this then increase the risk to the existing infrastructure it will sit on and interact with? Many questions to address and we will turn our focus to this over the next few sessions both with our partners and independently, and we look forward to gaining your insights as members on this topic as we progress.

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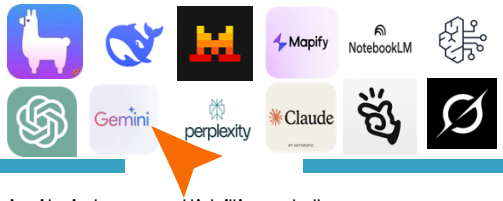
Generative AI Landscape_

Confused? ...you're in good company 🤷‍♂️



Since it's launch Generative AI has rapidly evolved from an interesting curiosity into a multi-trillion-dollar industry, with fastest adoption of technology ever! as millions of us utilise a range of solutions to aid our everyday tasks, or simply kids using it to cheat on their homework. The pace is incredible, and it shows no sign of slowing down, with a constant advent of new solutions & features appearing almost daily, and rapid retrofits of almost every traditional systems, to now be **"Powered by AI"**

Recent breakthroughs in model capabilities, and the rise of multimodal AI is offering smarter, faster more accessible models like GPT-4o and Claude 2.1, with tens of thousands of innovative apps and solutions usually built on the back of theses main model. Along with open-source models from the likes Meta, Mistral, and DeepSeek are challenging the big names, their business models, and their monetisation plans!
And in our focus as enterprises, we're continue to test, trial and observe with caution solutions such as Microsoft's Copilot and Google's Duet AI. As big tech drives further and significant progress behind the scenes, as they push into the Agentic AI space with solutions such as Azure OpenAI and Google's new Agentspace, holding promise to simply and safely automate many aspects of our work. Which collectively many are calling a new 'gold rush' of opportunity.

Progression of complexity

With so much innovation in a short time, things have become increasingly complex, even for the most technical practitioners. As business leaders begin or progress corporate AI projects, we face new challenges: What's new?, and does it change our plans? Could new models or capabilities offer better ROI?, can we easily migrate providers in future? and how does it all align with data governance?

So, we felt it was time to pause and give a basic snapshot of the main players behind the system that are likely to provide the power plants in our future solutions as a first step, with focus and intended App use cases.

Provider	Solution Name	Application Focus	Use Cases
OpenAI	ChatGPT 4.0	Chatbot, Multimodal Interaction, inc Sora	General-purpose conversational AI
	DALL-E 3	Image Generation	Image generation from text prompts
	Whisper	Speech-to-Text	Audio transcription
	ChatGPT Enterprise	Enterprise AI Solutions	Enterprise-level AI solutions
Anthropic	Claude 2	Text Assistant, Long-Context Processing	Creative content generation, summarization
	Claude Instant	Text Assistant, Fast Responses	Quick responses, lighter tasks
Google	Bard (Gemini-powered)	Chatbot, Information Retrieval	General-purpose conversational AI
	Gemini via Vertex AI	AI Platform, Model Deployment	Advanced AI models for developers
	Duet AI for Workspace	AI Assistance in Workspace	AI assistance within Google Workspace
	Notebook LM	Research, Document Analysis	Analyzing and summarizing documents
DeepMind	Gemini (advanced models)	Advanced AI Research & Applications	Advanced AI research and applications
	AlphaFold	Protein Structure Prediction	Protein structure prediction
	AI Agents & Robotics	Autonomous Agents & Robotics Development	Autonomous agents and robotics
Mistral	Mistral 7B	Language Model, Development	Development, experimentation
	Mistral Large	Language Model, Complex Tasks	Research, complex tasks
Meta	LLaMA 2/3	Large Language Model, Open Source	Research, development, various applications
	Meta AI	Chat Assistant	General-purpose conversational AI
	AudioCraft	Audio Generation and Manipulation	Audio generation and manipulation
	Emu	Image Generation	Image generation from text prompts
Microsoft	Azure OpenAI	Enterprise AI Services Platform	Enterprise-level AI services
	Microsoft 365 Copilot	AI Assistance in Microsoft 365	AI assistance within Microsoft 365
	GitHub Copilot	AI-powered Code Completion and Assistance	AI pair programmer
	Bing Chat	AI-powered Search and Chat	Web search with AI capabilities
Amazon (AWS)	Bedrock	Cloud-based AI Model Platform	Cloud-based AI platform
xAI	Grok	Real-time Information and Social Media Analysis	Real-time info retrieval, social media analysis
Manus	AI Agent	Multi-step Task Automation	Task automation, workflow management
DeepSeek	DeepSeek-R1	Open-Source Language Model	Research, development
	Chat App	Conversational AI Application	General-purpose conversational AI
	DeepSeek Coder	Code Generation and Completion	Code generation and completion
Perplexity	Perplexity	Search Engine, AI-powered Info Retrieval	Research, quick information lookup

Conclusion

Generative AI is becoming smarter, more accessible, and more embedded in daily operations, but it's also busy and confusing. The mix of open and proprietary models brings new opportunities, but understanding architecture and enterprise setup is vital to ensure security, availability, and appropriate data use, with awareness that **not all systems are enterprise-ready**. With increasing competition and the rise of autonomous AI agents, we are now approaching a further shift from useful to true digital co-workers. With the emphasis here is on ***co-workers***, not replacements.

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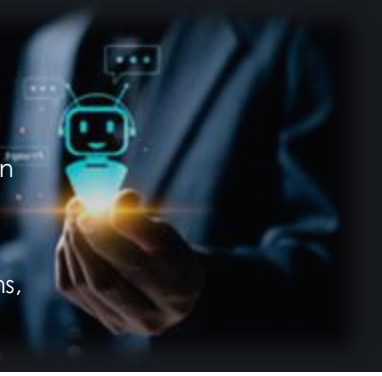
Special Agents_



As Amazon takes the reins of the next James Bond adventure, reimagining our favourite secret agent, we too find ourselves preparing for a future shaped by our own agents, AI agents within the workforce. As newer Agentic AI solutions holds the promise to completely transform the future of work. In many of our conversations, it feels like **this could be the true lever of change**, shifting AI from being merely useful in RPA and basic AI Agents, to becoming truly impactful and with newer Agentic systems, which hold promise to be almost as versatile and self sufficient as Mr Bond himself.

While Agentic AI will undoubtedly push the boundaries of automation, what we're likely to see is a blended workforce: a mix of traditional RPA, intelligent AI agents, and broader agentic systems. This fusion of technologies will help organisations tackle both ends of the spectrum, solving simple tasks at speed and empowering teams to navigate the most complex challenges with intelligence and agility…and the start of the AI empowered human.

Here we wanted to bring a brief overview of some of players & providers, covering the independent self serve no code low code providers, through to specialist niche providers & big tech's response to this growing opportunity.

Independent & No-Code/Low-Code AI Agent Platforms

These accessible platforms are ideal for individuals, SMBs, startups, and small teams looking to automate tasks without coding. They offer fast deployment, visual builders, and integration with popular apps. But also great test platforms for large enterprises and public sectors to try out ideas and test possible automations. **Examples:**

- **n8n**: Open-source automation with AI plugins
- **Zapier**: Natural language agent builder with 8000+ app integrations
- **Make**: Visual agent design and automation, direct competitor to n8n but has a low use free version
- **Stack AI / Voiceflow / Lindy AI**: Internal tools, chat/voice agents, productivity bots
- **Devin / Do Anything Machine**: Experimental autonomous agents

Use Cases: Automating admin tasks, onboarding flows, reporting, scheduling, and simple customer interactions.

Independent & Enterprise-Grade No-Code/Low-Code AI Agent Platforms

Balancing ease of use with enterprise readiness, these tools support automation in departments like HR, IT, and customer service, while offering better governance, scale and critically support and guidance in what to automate and how to deploy. Fully handheld by very capable experts to guide you along. **Examples:**

- **Netcall**: UK-based low-code AI for public sector
- **Moveworks**: IT/HR agents integrated with Slack/Teams
- **Aisera**: AI for ITSM and customer support
- **Interactions**: Voice-first virtual assistants

Use Cases: Internal helpdesk bots, automated IT ticket resolution, smart call routing, AI-enhanced portals for employees or citizens.

Enterprise-Grade AI Agent Platforms

Designed for complex environments, these platforms offer robust, scalable AI agents embedded into business operations. Often require IT planning and integration with enterprise systems, but will often bring lower operating costs and stronger security and governance and in the case of Microsoft and Goolge increased interoperability with wider business suites. We predict a big focus in them openly supporting organisation to help them build and deploy apps and cost savings as part of their wider tech solution suites. **Examples :**

- **Microsoft Azure AI / Google Agentspace**: Intelligent agents at scale, multimodal workflows
- **Salesforce Agentforce**: CRM automation with reasoning engine
- **IBM Watsonx / Amazon Q / PwC Agent OS**: Cross-platform agents, compliance, devops, customisable frameworks

Use Cases: Autonomous planning, intelligent assistants, procurement, onboarding, multi-agent collaboration, and process automation.

Suggestions & Considerations

A brief take on a sector about to enjoy incredible growth and set to reshape our organisations, as automation is evolving fast, expanding both its capabilities and the range of tasks now in scope. Some of you may remember the 'AI Role Mapping Tool' Ant shared at last September's Innovation Forum session at Samsungs KX London site, designed exactly for this moment to come. It helps map tasks by role and overlays potential AI automation and timelines. Let us know if you'd like a copy and well send one across.

We also have broader support from the teams at Google who are keen to support a future event to share more on Agentspace, and also from our friends at Netcall, who live and breathe this stuff are happy to help us explore some practical use cases to gain a feel for **the art of the possible**.

The 'Not So' Magnificent 7 News_

Last quarter, despite a combined YoY growth of $131.2 billion (31.7%) we suggested things might not be entirely rosy in the boardrooms of the Mag 7 and that tougher trading times lie ahead. Well, a quarter on and the prediction not only came to reality, but surprised us with a QoQ decline of 17.62% (end Mar excl Trump Tariffs impacts)

So what drove our prediction? A combination of overstretched AI investments, intensifying competition from China's, and early signs that promised business-case return dates slip 'way' back. Add then growing economic headwinds and you get a shift: these firms aren't just competing within their sectors they're fighting for relevance in our wallets and model of the past will be no surety of future success, everything has changed in tech.
And again, as Trump tariffs impact performance further, it will now be difficult to track our theory for a few quarters, but we will stay close, and for now let's explore what happening in the world of the now 'not-so' Mag 7

TESLA -35.8%

The biggest mover of this quarters report comes as no surprise, and love him or hate him, they didn't make many Elon Musk's, and as futurists we have always tracked his progress with keen interest. However, we move this quarter from admiration of his innovations to one of total despair. Asking simply, are his actions of DOGE and allegiance to the Trump administration going to provide the **Gerald Ratner moment of our day**? As we've often proved, society is now possibly the bigger driver of change, and people appear to have road rage. So, will the back lash continue to 'drive' this incredible brand to the kerb?

NVIDIA -19.3%

-Clearly some correction during 2024 Reduced demand forecasts as efficient Ai system such as DeepSeek require less processing power
-Chip Wars in China, driven by US restriction, inevitable and their innovation could now see China's glass chips surpass US or UK Amazon building their own Chips
-Landscape of main LLM providers stabilising a little and demand still high but forecasts on growth set slightly more realistically now.

Alphabet -16.5%

-Investors concerns around late to AI play, drop in Cloud revenues and Antitrust case, however, we predict case will be scrapped as Chrome will lose more ground to AI search.
-Tough year or two ahead as they need massive spend on AI infrastructure, and search revenues will drop off a cliff to AI alternatives and AI voice assistants
-It all rests on their innovation team coming up with something new and sticky, and we predict a personalise Gemini voice assistant, but it needs to appear fast!

amazon -13.3%

-Deceleration of Cloud hits the biggest cloud provider the hardest and the same apply to online sales revenues as macro economic pressures reduce consumer spending
-High AI investment costs both on training LLM and Chip manufacturing likely raising a concern for investors.
-Amazons attempt to buy TikTok would provide the much-needed social data set to improve model and reduce model training costs.
-Alexa plus bringing us closer to true personal AI assistant, one to watch closely this could be very big in time

Apple -11.2%

-Following a previous quarter of all time high revenues, this quarter see's a sharp drop in iPhone sales, especially in China. but their CFO is calling a positive Q2 (June), but trump tariff will likely skew actuals.
-Tariffs aside we predict two issues to impact results..
-Tim Cooks focus on manufacturing in the US will see costs increase and drive further deceleration in China
-Also the lack of AI play still a concern for investors. However, on the flip, this might be a master stroke as pay back on LLM investments is proving a challenge for others. And the new iPhone 16e could open wider user to provide our earlier prediction of the best devices to access a wide range of AI services.

Microsoft -10.8%

-Happy 50th Birthday but investors are spoiling the party with concerns over Cloud and Windows sales performance, despite solid earnings.
-AI investment realisations are now starting to sink in, with suggestions of slow down in investment but Satya Nadella still focused on leading Gen AI
-Focus on AI powered surface devices with new solutions expected but a Siri, Alexa type assistant is needed… come back of Cortana ?? O365's Co-Pilot the great hope but this will be challenged by Agentic AI solutions and competition fierce.
-It's all to play for and we still fancy MS to do very well overall here, but work to do on an AI Identity/voice.

Meta -14.4%

-After a huge previous quarter (+65%) closing out its 'Year of Efficiency' bolstered further by increased engagement across all platforms insta/Facebook/WhatsApp
-Massive investment in LLM & spatial might explain caution in stock
-AI driven engagement will likely lead to increased Ad interaction and stronger performance in full year.
-Spatial focus continues with Orion and Aria prototypes but some way off available actual (game changing) devices until much later in year.
-And again, we predict Glass will play a runner up to AI via Audio devices and our phone screens for some time to come, risky play short term but big prize long term for Meta

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It's Tech Showtime_

Who doesn't love a good industry trade show… but not much the hangovers that often go with them. But these welcome break from the day job to look forward and networking give us incredible insights into some of the progressions and overall intentions of the key tech providers.

And Q4 saw the two key events in the communications and technology world calendar, as both MWC and CES opened their doors to thousands of technology enthusiasts, industry providers and experts alike.

As expected, AI dominated the theme at both events but with devices and the all-important connectivity strong focuses at both events. See below a summary of the key news from both…

MWC 25

AI undeniably the dominant headline at MWC 2025, with reference and showcases in every discussion and exhibit, and importantly shifting focus from potential to practical implementation. Strong keynotes at the event focusing on AI's role in transforming network optimisation and efficiencies ready for increased on device processing and GenAI agents. Which is hugely positive and great foresight, but with 30 years in the telco industry we still see a major challenge here around how they will fund the required works, in a declining connectivity revenue model and wider competition of AI monetisation at an application and service level, will this lead to one of our previous prediction that increases convergence and consolidation of network operators is now a 'When' rather than an 'If' ? One to watch.

The event also served as a launchpad for many new innovative devices and concepts. Key product announcements included flagship smartphones like the Xiaomi 15 Ultra, noted for its advanced camera system, alongside mid-range contenders such as the Samsung Galaxy A56 and Nothing Phone 3a series. Foldable displays continued to evolve, seen in devices like Huawei's Mate XT Ultimate Design and concept PCs from Lenovo. Wearable technology saw advancements with AR glasses from brands like TECNO and RayNeo, Wi-Fi enabled earbuds like the Xiaomi Buds 5 Pro, and feature-rich smartwatches like the Honor Watch 5 Ultra.

Beyond consumer gadgets, significant developments were presented in network infrastructure components, cloud solutions from AWS and Google Cloud tailored for telecom, digital identity platforms, and a growing emphasis on sustainability within the tech lifecycle.

CES 25

Over 140k people made the trip to Las Vegas this year to see the latest and greatest tech developments, and as always CES didn't fail to deliver. This year as we would guess the spotlight focused on AI, smart devices and mobility, with NVIDIA's Cosmos AI model, designed to understand the physical world earning CNET's Best of CES award. Samsung introduced its 'Home AI' ecosystem, featuring interconnected smart appliances and the AI companion robot Ballie, enhancing home automation. LG unveiled a transparent OLED TV, blending seamlessly into living spaces when turned off, while Halliday's AI-powered smart glasses offered real-time translations and navigation assistance. In health tech, Eli Health's Hormometer provided at-home hormone level analysis, and the Kirin Electric Salt spoon aimed to reduce sodium intake by enhancing taste perception through mild electrical stimulation…..Shocking!!

In the automotive Hyundai showcased their Mobis's full-windshield holographic display, projecting driving information to enhance safety and reduce distractions. BMW's 'iDrive' panoramic display and Honda's AI-powered voice assistants in their upcoming EVs emphasized personalised in-car experiences. Will they get in car voice assistants right this time of will see see them simply as the access point/speaker and screen to our phone driven (excuse the pun) AI assistant? Our money is on the latter.

And one for the 'far out files' Xpeng AeroHT introduced a flying minivan concept, merging electric vehicle technology with vertical take-off capabilities, hinting at the future of urban mobility.

Spatial Computing

A topic that still see's many raised eyebrows as prototype of rather odd-looking glasses or futuristic headsets fill our news feeds. And after many years (in fact decades) of hearing how VR and now XR is going to change the world, coupled with Mark Zuckerberg quote that ' the smartphone will be dead by 2030' replaced by spatial devices (5 years from now… 🤔)…. And with millions invested and huge market value projections of **$945b by 2033** why has this supposedly game change tech, not actually appeared in view?

So, What's Going On?

While we question the current claims and dig deep into the current progress with our usual healthy challenge. Do we agree that this technology holds promise to be a totally game changer? In short Yes, we do 100%, but possible not as quick or as widely as many analysts and the likes of Zuckerberg are suggesting. And as a summary this is for 3 key reasons. **1.** The tech needs a little more time to mature. It's just not quite good enough yet, in terms of the user experience. **2.** Glasses and fashion go hand in hand, but fashion and people don't, so how do they design devices that passes the cool factor across our broad range of subcultures, or provide devices that can be customised to meet peoples tastes? A tall order in reality. **3.** While high end VR & XR is an incredible experience, the majority of the time voice only will address our needs, and rather than needing to work in an emersed state, simply putting on your headphones and speaking to an AI assistant, with a likely small avatar on our phone screen, our watches, or floating in the corner of our laptop screens, will be far easier and more popular. Seeing us only use full spatial immersion for more immersive tasks and shorter time frames, such as watching a film, attending an immersive video call, exploring complex data sets/subjects, attending a concert virtually or gaming. So not quiet the take over suggested for the near future, and more **just a handy third field of notification**. (with our phone being our **first** field, and our watches our **second**, glass now **third**)

Key Progress and Players We're Watching

- **Glass meets AI:** In just months, Ray-Ban Meta, XREAL, and Rokid have now all launched AI-powered glasses. Sesame is building a voice assistant for non-Meta devices. Real-time translation, visual recognition, and voice navigation mark the rise of context-aware wearables.
- **Big Tech bets big:** Meta's Orion and Google's revived Glass highlight long-term commitment. Apple paused Vision Pro production, but we predict a lighter, cheaper version is coming, with likely new Siri Assistant.
- **Voice as the true disruptor:** As explored in *The Future of Us*, voice-first is fast becoming the norm. Thanks to Agentic AI, voice assistants could do for spatial what mobile data did for smartphones.

Where It's Getting Real

- **Apple Vision Pro:** Benchmark set. Expect a more affordable v2.
- **Meta & Ray-Ban:** Stylish AI eyewear passing the fashion test with built-in Ai
- **XREAL & Rokid:** Affordable, practical, and already trending in Asia.
- **SpaceTop G1:** as explored last quarter progresses to plug in glass device that provides big screen virtual laptops. We feel this should be far bigger than it is.

Tech That Matters

- **Micro-OLED + Waveguides:** Sharper, lighter displays.
- **Miniaturisation:** Specs are starting to look like real glasses, but more work to do.
- **Sensor Fusion:** Smarter awareness with LiDAR, infrared and interaction with IoT
- **AI Interfaces:** Object recognition, translation, agents are the key enablers here
- **Natural Inputs:** Eyes, hands, voice as your interface, less phone to Zuck's point
- **Next-Gen Batteries:** Lighter, longer-lasting, faster to charge. All a positive step.

Spatial Industry

Sesame raise $200m to build Voice assistant for tech glasses

Alexa Plus brings a new dynamic to family voice assistant

Halliday launch sub £500 smart glasses that beam tiny screen to your eye

Smart Watch Market shrinks for the first time (7% YoY)

Forecast

Spatial technology is poised to move from novelty to a practical reality, and in time when fully integrated with AI assistants, it will likely become the new **digital remote controls to our lives,** and one thing is clear the spatial shift is now underway. And while it feels like a very consumer focused market, we've already done heaps in enterprise with Glass tech over the years and this next stage will see it massively transform our digital workplace solutions, reshaping how digital workplace solutions are delivered and empowering people with smarter, more intuitive tools..

Like laptops and smartphones before it, adoption is inevitable, but we may still be a few years early, and the current blocker isn't the tech itself, it's more about the design. To unlock real impact, it's time Big Tech shifted more focus toward making these tools genuinely desirable. Maybe what's missing now isn't function, but cool.

Robotics

If AI is the automation of the mind, robotics is the automation of labour! And now with a smarter, stronger, and more human face than ever. Rapid progress in Robotics' and AI combined over recent years, is now paving the way for robots to move from the reels of Sci-Fi movies into the very real reality of aiding and supporting our daily lives.

Why are we tracking this field?

Progress over the last few years and especially last year is now blurring the line between Sci-Fi and Now-Fi, as Robots become a major focus globally and especially in China, as they need bots to replace human as a critical aspect of their elderly care requirements. A combination of technical progress coupled with AI progressions and a race to monetise AI and Robotics, will likely see a range of robots deployed into our home, society and organisations in the very near future.

Overall, the robotics industry continues its meteoric rise, with industrial robotics expected to hit **$162.7 billion by 2030**, and humanoid robots and exoskeletons driving much of the attention—and the investment. The buy product of home domestic bots will follow

This quarter, we've seen leaps in capability, fresh competition, and a big push toward real-world use, especially in logistics, manufacturing, and healthcare. And AI, especially foundation models like **NVIDIA's GR00T**, are giving robots more autonomy and an ability to learn and move like us…gulp.

Industry News

Hugging Face acquire Pollo bringing open-source AI and open-source bots to life.

China build a nuclear drone, which in theory never needs to land. Progress or massive Risk?

Meta rumored to be on the acquisition hunt for a robotics firm, with Makin at the top of the possibles.

As Robots take off Roomba close to closure after failed Amazon merger fell through

Driving Forces

The Brains Behind the Bots : Major players like **NVIDIA**, **Sanctuary AI**, and **Tesla** are combining advanced AI with real-world robotics. Expect robots to better interpret language, mimic human gestures, and operate with impressive physical dexterity.
Necessity Meets Opportunity : Labour shortages, aging populations and changing work attitudes are forcing innovation, and fast. China, for instance, is rapidly advancing robotics to support elderly care after decades of population control policies (see last quarters report for more info on this)
Exoskeletons Take the Strain : Medical and industrial exosuits are maturing fast. From **stroke recovery** to **lifting in logistics**, new smart exoskeletons are boosting human capabilities and tackling injury risks at scale.

Standout Movers & Shakers

- **Boston Dynamics**: Their electric **Atlas** is coming, which is fitter, smarter, and ready for real jobs.
- **Figure AI**: Their **Figure 01** and **02** are fast becoming the poster-bots for general-purpose robotics.
- **Apptronik**: Their **Apollo** robot is already being trialled with Amazon.
- **1X Technologies**: Building affordable, home-ready humanoids with lifelike movement.
- **Ottobock & Lockheed Martin**: Leading the way in industrial and military-grade exoskeletons.

Tech Leaps to Watch

- **AI + Robotics**: Robots are starting to learn like we do, through trial, error, and massive datasets.
- **Tactile Sensing**: Better grip, better control, robots now "feel" what they touch.
- **Battery Breakthroughs**: Longer life, lighter loads. Essential for wearable tech and mobile bots.
- **Materials Magic**: Lighter and stronger, thanks to innovations in carbon fiber and alloys.
- **Natural Collaboration**: Robots are becoming better teammates, with speech recognition and even emotional awareness under development.

What This Means for Us?

Expect robots to become a very natural part of workplaces and everyday life in the not too distant future, from factories and industry through to hospital and care assistants, and maybe even home companions close behind them. Challenges around cost, safety, and interoperability remain, but momentum is building fast. And yes, we'll need to think carefully about governance, ethics, and upskilling people to work *with* bots, not just around them

Early days in reality but we aim to be ahead of the curve on this and ready for the next acceleration, just like we were on AI and will keep it a key part of our research

Interest to learn more? See page 17 for more detail where we have a kind invite to join our friends at the National Robotarium in Scotland for a tour of their incredible facility and to get hands on with some of the very latest in robot technology. Oh and we get to meet Ameca, which we are really looking forward to and hope you can all join us.

Practical Applications_

As leaders, we face a shared challenge, not just in keeping up with rapid technological progress, but in cutting through the hype to understand real ROI. While AI promises remarkable transformation, this isn't our first rodeo. From Y2K to GDPR, we've seen waves of change, and once again, we're the ones shaping the future of our organisations so it's critical we get it right.

When asked recently, "What's our Innovation Forum all about?", I replied, "We're a bunch of nice people with shared challenges, who exchange ideas and insights." That spirit was perfectly reflected when MGroup agreed to share an update on their AI journey. What follows, for me, is a true masterclass in innovation

The Background

Many of us have debated the value of Microsoft's CoPilot — especially when comparing time-saving claims to real-world results. During one such trial, the M Group team launched a side project to explore how they may utilise Azure OpenAI to create a single interface for accessing data, knowledge libraries, and third-party apps.

Two separate explorations soon converged into a powerful solution that not only delivered major cost savings but also introduced a scalable AI toolset to empower their teams.

M GROUP

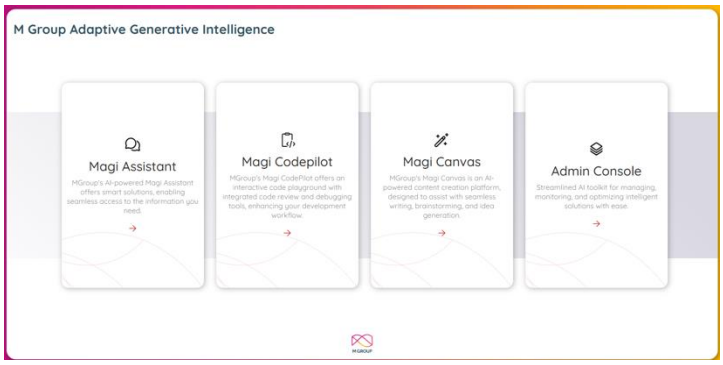
Struggling to see the ROI of Microsoft's Co-Pilot solutions?
Why not build your own…The team at MGroup did just that!

Introducing MAGI – A Custom CoPilot Assistant to Empower Their People

Built on Microsoft Azure's OpenAI toolkit, MAGI brings together key business systems like Salesforce, SharePoint, Outlook, and BMS via a single platform with four core tools:

- **MAGI Assistant** – AI-powered assistant with secure access to systems and apps
- **MAGI CodePilot** – Natural language interface for coding support
- **MAGI Canvas** – Gen AI tool for content creation and brainstorming
- **Admin Console** – Toolkit to manage and optimise all solutions

It's fast becoming the go-to platform for AI-driven working — the start of true Agentic AI & AI Personal Assistants in the workplace.



The Benefits

The results? Significant cost savings and improved accessibility for their workforce.

To put it in perspective, consider the fee of £25 per user, per month. MGroup's challenge was supporting 12,000 contracted and a further 12,000 subcontracted staff — which could equate to a potential cost of £600k per month over time. Instead, they deployed a free-to-use solution built by just two people over the course of only eight months. The convergence of two projects resulted in a highly versatile and cost-effective outcome — making full use of existing tenanted systems to maximise asset utilisation while upholding guaranteed security standards.

Where Next?

This is just the beginning. Project lead Iain Janssens (Group Head of Business Systems Support & Group Lead for AI) and Innovation Forum member, shared that while uptake is growing, the solution is still evolving. With 800 users currently engaging via an AI Community Forum, sharing ideas and feedback which is fuelling an ambitious roadmap of updates.

Keen to Learn More?

We're planning another in-person Innovation Forum, focused on the practical applications of AI, and I'm thrilled to confirm that the M Group team will join us on stage to share even more about their innovation journey. I also asked Iain to offer a few closing reflections — practical advice and key learnings from this early stage of the project.

Key Learnings & Takeaways

- **Stay Informed:** Keep exploring the tech horizons and features of the tools you already have.
- **Explore the Art of the Possible:** Innovation ideation moves ideas to solutions.
- **Don't Limit Yourself to One Tool :** Utilise and combine the range of applications available.
- **Build a Community:** Share information and develop channels for feedback and new ideas.

With kind thanks to our Innovation Forum members and friends - Iain Janssens, Allen Darnell, and Graeme Cross of M Group for agreeing to share details of their incredible project.

Societal & Economic Drivers_

As expected, another challenging quarter for both business and consumers, as the impacts of autumn statement and increased cost of living draw to implementations. And again, we offer our view and checkpoint here stressing that we are not economists nor social scientists, but that the societal and economic levers of change are a significant area of focus for us as we **'follow the money'**, and **'follow the mood'** as part of our **Collision Sequencing Methodology** which we use when predicting likely future outcomes. And while many may feel we are somewhat playing out of position on this topic, the reality is that our results are often more accurate than most economist, so we will continue to push on with the caveat, that unlike the tech world this is purely an opinion in areas of interest as a sense checker, rather than expertise.

Economy

While a technical recession looms, results are possibly not as bad as some expected with UK inflation showing a steady decline, falling from 3.0% in January to 2.6% by March, driven by lower energy and fuel prices and easing food costs. However, core and services inflation remained relatively elevated, reflecting persistent underlying price pressures. Despite this short-term relief, forecasts suggest inflation will rise again in the coming months due to increased energy bills, higher social security contributions, and a significant minimum wage hike. The Bank of England responded to the easing trend with a rate cut to 4.5% in February, which also helped first time buyers, and its likely they will cut further not only to ease inflation but also balance overall spending.

Unemployment raises slightly as businesses clearly display caution on new hires in terms of the National insurance costs, with many possibly finger pointing layoffs to mask wider 'in train' restructure cost cutting exercises, and also new employee rights changes resulting in wider caution and overall structural cost reviews.

Inflation	GDP	Interest Rates	Unemployment
3.4% ↓ 0.1%	0.1% ↑ 0.1%	4.5% ↓ 0.25%	4.4% ↑ 0.1%

Society

While we observe the lead indicators above and the powers that be tweak the fiscal levers to find balance in growth, Inflation, interest rates and unemployment, we also focus our attention to explore how society responds, in terms of our own collective actions, and parking any political view but instead asking 'what are the unintended (or possibly intended) consequences of budget changes".

Well, the last three months have provided plenty of food for thought, from the increase in unemployment from a caution jobs market, which see's the so-called squeezed middle under more pressure and will result in cutbacks on luxury spends, either due to increased periods of unemployment, or caution over job security, or pension pressure and future tax risks concerns. A reduction in services and retail spending across society as mid to lower income households feels the pinch of high housing rents, due to a vast reduction in rental properties following the renters rights bill, and cuts to Disability benefits announced in the spring statement, both reducing or removing spend power of this usually high spending sector of society, especially in the service sector basket. (contrary to public perception) Further impacts will come by Increased costs to UK retailers increasing prices on the back of Global Tariff changes all of which will see a reduction in spend naturally drives down inflation. Some potentially controversial points here, but please don't shoot the messengers, the data is the data and ignoring this would skew the actual reality.

Forecast

We feel we will see inflation fall further as changing spend habits play through across society, either by self imposed caution or force reductions by policy and likely tax rises later in the year. Interest rate cuts remain the most obvious lever to increase consumer spending by freeing up the spend income taken by the increased cost of living and expected hikes due to the increased rental costs and retail goods on the back of tariffs. But as above our call out here is that the increase in rental will negate any benefits as mortgages might reduce on lower interest rates but increase risk to landlords and rapid growth in 'build to rent' sector are unlikely to pass on reduced interest rate savings to renters. (rental sector increased 35% 9.8m homes versus 65% 18.2m owned homes) We expect the introduction of rental price caps to address this but pull through will take us into 2026 to see benefits. Our prediction (but possibly for different reasons) is shared by the BoE, as they halved their growth forecast for 25' to 0.75% from 1.5%.

And living true to our futurist focus, this raises a question : is this an opportunity (positively and negatively) for organisations to accelerate their AI plans to see what else bots can do, as a realistic alternative to now more expensive and supported humans?… One for our next face to face session.

People Focus_

While we navigate new advancing technologies and solutions in areas such as AI with interest for our organisations. At the same time our people are watching on with growing interest with realisation that change ahead is likely inevitable.

So how do we navigate and lead our people through an inevitable transforming landscape and build inclusive digital cultures within our businesses?

Fostering a 'Real' Digital Culture

Reflections from recent research, events & forum member discussions

Are We Culturally Ready for Digital Transformation?

I open every keynote with the line, ***"We are living through a history lesson of the future."*** It's a reminder that we're in a period of rapid, systemic change—one that will be studied for generations ahead. And change that resulted in me leaving a very secure 30-year career to focus entirely on helping organisations navigate this period of change. But not simply through technology as many might imagine, but also by addressing its profound impact on people, culture, and work.

So I was delighted when Virgin Media O2 invited me to lead a session on **Digital Culture**, inspired by their work with **Bruce Daisley** (ex-Twitter & Google) a digital culture expert, and some research work they carried out with the CEBR. And I was thrilled to be joined by two of our Forum members and experts **Kate Shaw** (HR VP - Pladis Global), **Janet Trowse MBE** (Fractional HR Director) and also Omdia 's chief Analyst **Camille Mendler** and Virgin Media O2's **Martin McFadyen,** on a panel where we explored the cultural side of transformation, a "sleeping giant" often overlooked.

Culture eats strategy for breakfast – Peter Drucker.

But how do we move beyond the slogans?

Bruce delivered a fantastic keynote which challenged the myth of corporate culture as a true differentiator, exposing how many businesses confuse slogans with substance. Culture, he argued, is built daily—through trust, psychological safety, and human connection, not top-down mandates. He also highlighted the **UK's £111bn loss due to slow digital adoption**, revealing a gap between perceived and actual digital maturity.

As a group we then discussed the key challenges:

•**Misguided Tech Adoption**: Many organisations rush into technology without clear purpose, leading to wasted investments and disengaged teams—an issue we now see with AI.
•**Generational Myths**: Janet Trowse MBE debunked the idea that younger employees are naturally tech-savvy—successful adoption depends on inclusive, tailored learning, asking are we doing enough to upskill.
•**Hybrid Work & Culture**: With fewer office interactions, culture must now be intentionally curated through rituals, connection, and experimentation.
•**Corporate Herding**: Too many firms follow trends out of fear. Great organisations stay human-centred, fostering resilience through empowered, connected teams.

Reflections

- Culture is built, not inherited, nor just a company slogan
- Psychological safety drives high performance.
- Digital maturity demands behavioural change, not just new tools.
- Resilience grows in trusted communities, not silos.
- Question trends—don't copy them blindly.
- Small rituals matter—they're the glue of culture.

For us this session and following recent conversations with many of you as forum members, reinforced why our Forum exists: to shape responses to change with real-world insight and curiosity. There's no roadmap for where we're heading, but together, we can lead with purpose, and positivity support our peoples journey through change and most importantly…ensuring that no one is left behind.

Link here to access the full Virgin Media O2 Report :
https://www.virginmediao2business.co.uk/digital-culture/

Risk, Threats, Regulation & Governance_

Once again, in the absence of official guardrails for AI in the UK, and a growing need to now progress our AI explorations and implementations, it feels a bit like we are playing a game of chess without fully understanding the rules. And while our own due diligence and self-imposed rigour is high on the back of GDPR. This one feel more dynamic, with an ever-changing solutions landscape, an unprepared workforce, and significant and evolving risks related to data use and security.

For us, navigating this evolving environment is going to require ongoing vigilance and our collective and proactive focus. So this quarter we check in on the latest changes and also look to other countries more progressed policies & position, as a guide of what might follow in the UK.

United Kingdom

The UK government is shifting towards targeted AI legislation, focusing on regulating the most powerful models while continuing to focus on innovation. The AI Opportunities Action Plan (Jan25) highlights efforts in infrastructure, compute, data access, and skills, alongside a rebranded AI Security Institute emphasising security risks, fairness, and bias.

Parliamentary activity includes a reintroduced Private Member's Bill proposing an AI Authority, with measures addressing issues like AI-generated CSA material. A broader consultation on AI regulation is also anticipated.

European Union

The EU AI Act came into force in Aug 24, with implementation ongoing. A ban on 'unacceptable risk' AI practices began in Feb 25, and new obligations for General-Purpose AI models will apply from Aug 25, followed by high-risk system rules in 2026/2027.

The EU AI Office is developing guidelines and support frameworks. The "AI Continent Action Plan" (April 25) focuses on strengthening EU leadership through infrastructure, data access, sector-specific AI adoption, skills development, and regulatory services.

United States

The U.S. federal approach to AI shifted sharply in January 2025 under a new administration. An executive order reversed previous restrictions, promoting deregulation to boost innovation and global leadership, while rejecting perceived ideological constraints.

Federal agencies have been encouraged to adopt AI to enhance public services and increase vendor diversity and workforce readiness, a similar theme in many countries. Meanwhile, states are advancing their own AI laws. California began enforcing rules on consumer data and healthcare AI use. A multistate working group is coordinating efforts for consistency across state policies.

Wider Global Developments

AI regulation is advancing worldwide but remains fragmented, with countries adopting varying approaches such as comprehensive laws, sector-specific rules, and voluntary codes. Notably, South Korea passed a comprehensive AI law in January 2025, while several Latin American nations are progressing with similar initiatives.

Despite challenges in achieving global harmonization, international cooperation efforts continue through forums like the AI Action Summit and Council of Europe. Common global themes are emerging, centred on risk management, accountability, safety, fairness, transparency, and human oversight.

Conclusion & Reaffirmed Recommendations

The AI regulatory landscape continues to be highly dynamic, and the EU continues to be our closest guide with a comprehensive, implemented framework. The gloves are off globally as every country now realises impacts of AI and need to be present its risks and opportunities alike. Changes to US regulation come as no surprise and we expect to see more compromises on data protection and privacy as they use more data to compete mainly with China, and also to monetise their huge investments. And again, while a daunting prospect for the use of our Data (as pre our view on page 16) this will also be met with a new audience willing to share more data to make the service more impactful and useful. We strongly believe that a handful of very innovative providers will recognise this opportunity, and they'll focus on the benefit over the risks. We'll continue to track.

Our recommendations remain the same:

1.Treat the EU AI Act as a minimum compliance benchmark.
2.Implement robust internal governance frameworks now.
3.Document all AI development and deployment decisions meticulously
4. Ensure comprehensive training plans are in place for employees,
5. Write or review clear AI use policies.
6. Educate staff on wider AI-related risks, especially scams, our new threat landscape!

Opinion_ Values at a crossroads

A conversation with Ant Morse & David Clarke OBE

As someone deeply immersed in the opportunities of AI and emerging technologies, I often find myself championing what's next and what's possible. But sometimes, the most powerful conversations are the unplanned ones. That's exactly what happened over lunch recently with fellow Innovation Forum member, **David Clarke OBE**.

Over Pizza and a coke, David posed a sharp and timely question: *"If companies are rolling back DEI policies and we open security backdoors to encryption, what does this mean for our data, our values, & ultimately us?"*

It was such a vital discussion that we agreed it needed a bigger audience so with kind support from our friends at Cavell, we took it to the main stage at their **European Summit**, where we co-hosted a fireside chat titled: "Values at the Crossroads: Balancing Ethical Principles and Personalised AI in an Age of Digital Compromise."

Where Our Conversation Took Us

David opened by challenging whether DEI (diversity, equity, inclusion) could be quietly deprioritised. *If that becomes the norm—what's next? Will accessibility become optional too?* I then questioned whether organisations bidding for global contracts might dilute their values to align with shifting public policy? And then, can we really back brands that act one way in the boardroom and another in the bidding room?
David also raised the issue of Apple's encryption policy being challenged in the UK, as we discussed that, once a door to private data is opened, it's hard to close again. And as **AI systems grow increasingly reliant on personal data**, commercial pressures to share more will only grow, raising ethical and operational risks.

The Broader Risk

David shared his own lived experience as a blind person, explaining how technology transformed his life in everyday use. But he warned: if ethical commitments fade, how will vulnerable users be protected? The data we share today such as health, location etc, could be used against us tomorrow. Insurance, employment, credit ratings: the risks are real, not theoretical.

My View as a Futurist

I shared that we're just scratching the surface of AI's potential. Explaining my thought on the likely introduction of **Personal AI assistants, who will support our every day life further,** but also able to make decisions for us based on our values. Imagine asking your AI to find a coffee shop while your out and about, but only to find one that pays UK tax, is accessible, has a robust DEI policy, and a security approach you trust.
Now imagine that service was run by **a user-owned co-operative**, not a tech giant. Where we'd decide how our data is used, with some users chosing to share more of their data in return for cheaper services, others opting for tighter control. That's the future I'd love to see: where **we vote with our data**.

But There's a Catch… in fact there are many.

But as a battle-weary realist, I know such a model might get swallowed by Big Tech before it ever takes off. And that Governments may seek more control. Big Tech may resist. But collectively **we**, the public, have power, if we choose to use it. The risk lies in **silence and inaction**. But also, in the lack of viable alternatives. And just days after our session, DNA company **23andMe filed for bankruptcy**. A stark reminder: who owns your data in a fire sale? And what stops it being reused in ways you never agreed to?

So What Now?

This discussion was just the start. At the summit, David outlined what organisations can do now: Be transparent about how data is collected and used - Build security and ethics into systems by design - stand firm in values, not just branding - And for all of us: ask more questions. Push for better. Use your influence.

But what can we do?

We may not have all the answers, but these conversations now matter more than ever. David and I have a history of challenging the "No's"—like when we helped distribute iPhones and iPads to blind children with the help of Virgin Media O2 and the GoodThings Foundation.

So, is this our next project for positive change?

Let me know if you're in for the next conversation. We might be meddling dreamers, but we're not alone. And if nothing else, Pizza at Carvan Fitzrovia is well worth the trip.

Final Thoughts

I ended by asking David what his guide dog Bernie might think about the rise of AI and robots potentially taking his job. David laughed and said Bernie would be delighted. And judging by how peacefully Bernie slept on David's foot the whole time, the audience agreed: he didn't look too concerned… just yet! 🐕‍🦺

Innovation Forum Roundup_

"Alone we can do so little, together we can do so much "
Helen Keller

Robotics Forum Session – Date to follow soon

Our friends up at the National Robotarium have kindly offered to host us and provide a showcase of the latest development in Robotics at their state-of-the-art facility at Heriot-Watt University campus. Offering us unprecedented access to advanced robotics and innovations. We'll here from their CEO Stewart Miller sharing his view on the overall UK Robotics industry and future ahead, and we'll then get up close to not only the latest state of art robots such as Ameca and Unitree's G1, but also the smaller custom fabricated robots they are building, including some for our own forum members innovations *(subject to IP projection approval)*

This session is likely to be held mid July before the schools break up, confirmation and invites to follow soon.

A busy Quarter out with you our Members

SCOTTISHPOWER

I was thrilled to join Tom Williamson, Rafa San Juan and their Innovation teams up in Glasgow and live streamed to their wider global business units, Speaking as part of their very impressive Innovation event, which for me was a master class in innovation collaborations

Novuna

Great to meet up with old friends and founding forum members Jo Armstrong, Andrew Herbert, Mark Williams and their Teams, speaking at their Tech Bash in Leeds
Also awesome to meet Nick Broughton their CIO and I enjoyed some incredible likeminded discussions through their very insightful event.

cavell

Joining our friends at Cavell for their European summit in London where they kindly hosted myself and Forum member David Clark OBE for our all-important conversation on Values in an evolving digital age, as detailed on Page 16 in this report.

Virgin Media O2 Business

Our friends at Virgin Media O2 Business kindly asked me to host and support their own Customer Innovation Forum in Feb, which many of you attended at their incredible new Paddington home. We were joined by Digital Culture Expert Bruce Daisley who delivered an incredible and insightful keynote, before our very own HR experts of Kate Shaw & Janet Trowse MBE joined Bruce and VMO2's Martyn McFadyen for a panel discussion sharing our own experience and advice on what makes a 'real' great digital culture, feedback calling out a much-needed discussion and also a welcomed break from talking about tech… . See a summary on page 14

Practical Applications Session

We have a lot of interest from a wide range of leading organisations keen to support us as a forum on the topic of the practical applications of AI, which is great to hear, and We are working through some date options and plans for this session likely after the school holidays, and more details to follow asap.

Spatial Computing Session

We are still also planning a Spatial computing review session kindly support by our friends at RIVR who are leaders in XR solutions and will both guide us on the latest development in this space but also bring some kit along, so we can see what all the fuss is about on the latest XR solutions 'actually' being used in industry.

Supporting Future Talent

The strength of our Forum lies in the power and positivity of our network. Today, we'd love your support in helping one of our founding members, Simon Body, and his son Callum who is looking to find his next placement opportunity. Callum is a talented and ambitious graduate from Staffordshire University with a 2:1 degree in AI and Robotics, strong academic foundations (A-levels and BTEC in Computer Studies), and hands-on experience from recent placements at Fujitsu AI and ISDM. He also brings early exposure to AWS and Azure cloud architecture, a fresh thinking viewpoint and is eager to continue applying his skills.
If your team is hiring early-career talent or offering internships or placements, we'd love to connect you with Callum and support him on the next step of his journey.

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