

Strategic Foresight Guild

20

# *Trends Report*

26

An analysis of emerging  
innovation patterns

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## *Introduction*

This first annual trends report from IBM's Strategic Foresight Guild offers a comprehensive analysis of emerging trends shaping the technology industry. As the technological landscape continues to evolve at an unprecedented pace, staying informed about emerging trends that may impact product strategies has become essential for organizations navigating the year ahead.

Following an extensive signal-finding process that involved comprehensive industry research and analysis of innovation patterns across sectors, we collected 102 signals. Through synthesis and thematic analysis, these signals were organized into 10 categories and distilled into 20 key trends which this report will explore.

Designed for decision-makers, product leaders and strategists across sectors, this report synthesizes complex technological shifts into actionable insights that can inform strategic planning, guide product development, and help organizations anticipate and prepare for future challenges and opportunities.

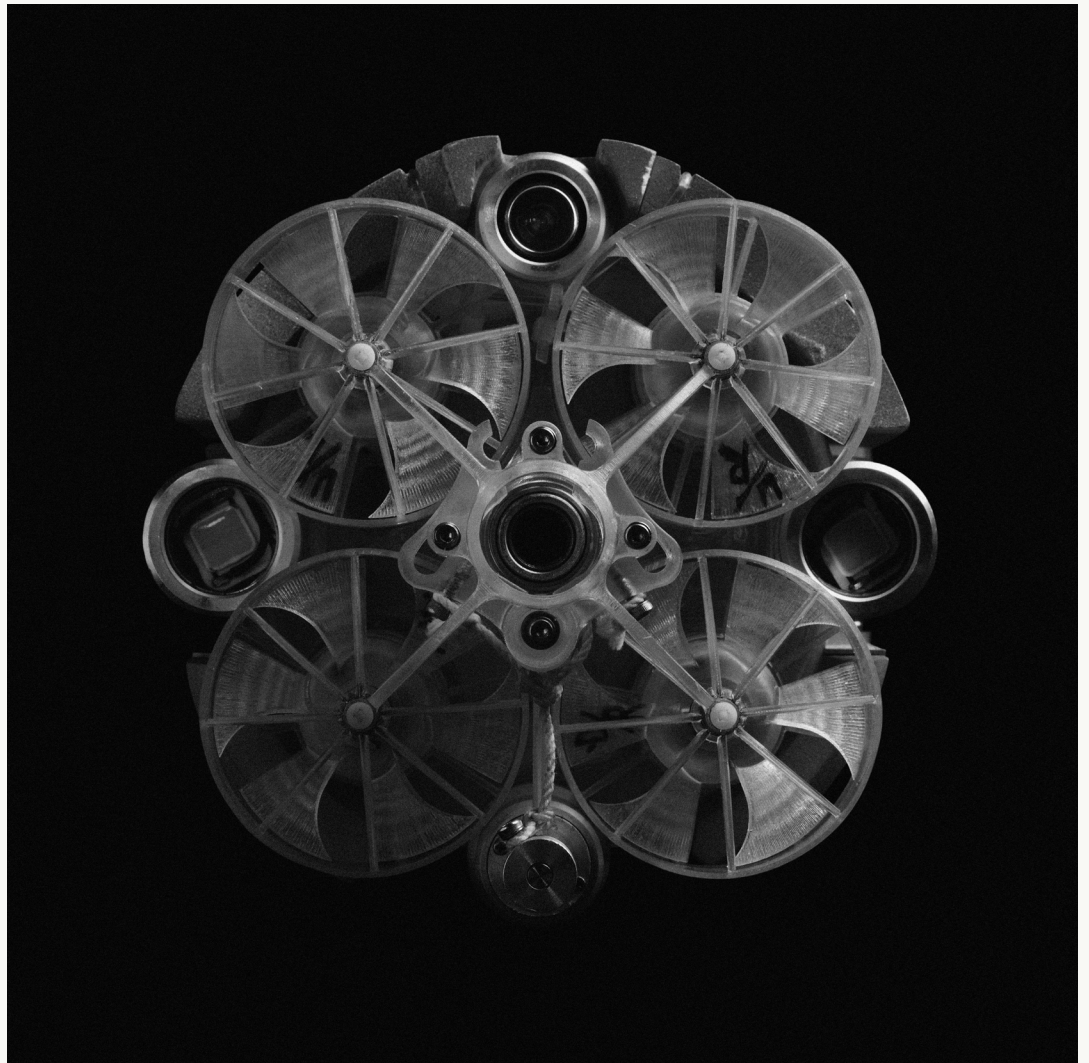


Image by Spencer Lowell

## About the Report

This first annual trends report from IBM's Strategic Foresight Guild offers a comprehensive analysis of emerging trends shaping the technology industry. Designed for decision-makers, product leaders, and strategists across sectors, this report synthesizes complex technological shifts into actionable insights that can inform strategic planning, guide product development, and help organizations anticipate and prepare for future challenges and opportunities.

By examining these trends through a strategic foresight lens, we aim to move beyond surface-level predictions and provide context for how these forces may interact, evolve, and impact your work. Whether you're developing new products, refining organizational strategy, or building long-term roadmaps, this report offers a foundation for more informed decision-making.

Founded in 2020 by Dan Silveira, Roosevelt Faulkner, and Meghan McGrath, the Strategic Foresight Guild began as an initiative to educate and train IBMers in strategic foresight practices. It has since evolved into a thriving cross-functional community for anyone passionate about strategic foresight and innovation strategies. With over 400 members globally, the guild hosts monthly talks and an annual Future Fest event.

## Research Methods

This report is built on a comprehensive horizon scanning process designed to identify weak signals and emerging patterns across the technology landscape. Our research team conducted an extensive review of industry articles, white papers, academic research papers, technology journals, and credible online sources spanning multiple sectors and geographies. To enhance the breadth and depth of our research, we leveraged Claude AI to assist in identifying additional relevant sources and uncovering connections across a variety of domains. Each source was carefully analyzed to extract signals, which are early indicators of technological, social, and market shifts that may shape the future.

The 102 identified signals were then systematically processed and synthesized to reveal underlying patterns and thematic connections. Through iterative analysis, we organized these signals into 10 distinct categories, each representing a broader area of technological change. From these categories, we identified 20 key trends that demonstrate significant potential to impact product strategy, organizational planning, and the broader technology ecosystem in the year ahead.

### Guild Committee Leads

- ↳ Dan Silveira
- ↳ Roosevelt Faulkner
- ↳ Meghan McGrath
- ↳ Dipali Aphale
- ↳ Phil Doyle
- ↳ Jen Hatfield

## *Trends Overview*

The trends that follow are organized by their current stage of trend maturity based on our research findings, helping you prioritize where to monitor, experiment, or invest based on your organization's 2026 roadmap planning.

## Trend Phases

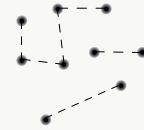
### Early Stage <sup>(ES)</sup>

Technologies that show high potential for society, but remain years from mainstream impact. These require patience and small bets. Watch for signals of acceleration, but don't expect near-term disruption.



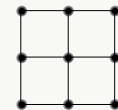
### Breaking Through <sup>(BT)</sup>

Technologies that are moving from niche to broader adoption right now. These represent the highest urgency for strategic planning, as competitive advantages and market positions are being established in real-time.



### Mature Growth <sup>(MG)</sup>

Technologies that are already widespread and continuing to expand. The question here isn't whether to adopt, but how to optimize and respond to their evolving implications.



## Trends List

### Quantum Computing <sup>(ES)</sup>

Computing systems that leverage quantum mechanical phenomena to solve problems beyond classical computer capabilities.

- ↳ Emerging quantum advantage accelerating enterprise investment and practical applications
- ↳ Scaling quantum computing deployment encountering technical and workforce challenges

### Neurotechnology <sup>(ES)</sup>

Brain-computer interfaces that enable direct communication between neural activity and external devices.

- ↳ Advancing BCI technology expanding medical applications and fueling market growth

### Climate Technology <sup>(ES)</sup>

Technologies and solutions designed to mitigate climate change impacts or adapt to environmental challenges.

- ↳ Rising AI and data center energy demands driving grid strain and accelerating alternative energy investments
- ↳ Scaling EV adoption reducing battery costs and accelerating market accessibility

### Robotics <sup>(BT)</sup>

Scaling humanoid robotics advancements driving fierce competition for market dominance as user needs grow.

- ↳ Accelerating robotic manufacturing scaling production to meet projected market demand
- ↳ Scaling humanoid robotics advancements driving fierce competition for market dominance

### Digital Twins & IDs <sup>(BT)</sup>

Virtual replicas of physical objects, processes, or systems that mirror real-world behavior in real-time.

- ↳ Expanding digital twin adoption revolutionizing digital identity verification and management
- ↳ Growing digital twin integration strengthening banking resilience and fraud prevention

### Extended Reality <sup>(BT)</sup>

Human-computer interaction technologies that blend digital content with physical space, including AR, VR, and mixed reality.

- ↳ Expanding spatial computing adoption transforming workplace productivity and collaboration
- ↳ Growing mixed reality integration enhancing education and training effectiveness

### Workforce Transformation <sup>(BT)</sup>

Shifts in labor markets, skill requirements, and organizational structures driven by technological and economic change

- ↳ Widening workforce skill gaps accelerating layoffs amid organizational digital transformation
- ↳ Rising economic and geopolitical instability eroding employee morale and productivity

### AI & Automation <sup>(MG)</sup>

AI systems and machine learning algorithms that enable machines to perform cognitive tasks and automate decision-making.

- ↳ Accelerating AI-assisted code development transforming software engineering workflows
- ↳ Evolving AI training strategies advancing reasoning capabilities and model performance
- ↳ AI agents automating enterprise workflows and decision-making
- ↳ Expanding open-weight AI models democratizing access and driving performance gains

### Cybersecurity <sup>(BT)</sup>

Technologies, processes, and practices designed to protect networks, devices, and data from unauthorized access or attacks.

- ↳ Escalating AI and quantum threats intensifying cybersecurity vulnerabilities and defense requirements

*Analysis*

Each category analysis includes the associated trends, implications, and examples. Use these groupings to calibrate your strategic response: monitor emerging technologies, act on breaking-through opportunities, and optimize mature deployments.

# Quantum Computing

Quantum computing has reached a critical inflection point, transitioning from theoretical promise to tangible commercial reality. The industry is approaching quantum advantage; the milestone when quantum computers can exceed the performance and accuracy of classical computers for specific applications. Recent research indicates quantum advantage is likely to emerge by the end of 2026, accelerating enterprise interest and investment. The global quantum computing market reached \$1.8 billion to \$3.5 billion in 2025, with quantum computing companies generating \$650 million to \$750 million in revenue and projected to surpass \$1 billion in 2025.

## Analysis

Perhaps the most significant development has been the dramatic progress in quantum error correction, addressing what many considered the fundamental barrier to practical quantum computing. Google's Willow quantum chip, featuring 105 superconducting qubits, demonstrated exponential error reduction as qubit counts increased and completed a benchmark calculation in five minutes that would require a classical supercomputer  $10^{25}$  years to perform. IBM unveiled its fault-tolerant roadmap centered on the Quantum Starling system targeted for 2029, featuring 200 logical qubits capable of executing 100 million error-corrected operations.

Recent breakthroughs have pushed error rates to record lows of 0.000015% per operation. In March 2025, IonQ and Ansys achieved a significant milestone by running a medical device simulation on IonQ's 36-qubit computer that outperformed classical high-performance computing by 12 percent; one of the first documented cases of quantum computing delivering practical advantage over classical methods in a real-world application.

Despite these breakthroughs, the quantum industry faces a significant talent shortage. McKinsey estimates that approximately 250,000 new quantum professionals will be needed globally by 2030, with only one qualified candidate existing for every three specialized quantum positions. Investment momentum remains strong, however, with nearly \$2 billion invested in quantum startups in 2024 (a 50% increase over 2023) and governments announcing \$1.8 billion in funding. The United Nations designated 2025 as the International Year of Quantum Science and Technology, catalyzing educational initiatives worldwide. While organizational readiness has advanced, challenges persist including inadequate quantum skills (61%), immature technology (56%), unclear use case timelines (46%), and expensive hardware (41%).

- ↳ **Quantum Computing** <sup>ISS</sup>
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity



Image by IBM

**Implications**

As quantum computing reaches quantum advantage and beyond, demand for qualified workers in the space will likely intensify as more industries work to integrate quantum systems into their existing computing infrastructure. The current shortage, with only one qualified candidate for every three specialized quantum positions, could worsen as the technology matures and adoption accelerates. Simultaneously, we may see a surge in medical breakthroughs as quantum computing is adopted globally, particularly in drug discovery and molecular simulation where quantum systems have already demonstrated practical advantages over classical computing methods.

However, the approach of Q-Day, when quantum computers become powerful enough to break current encryption standards, raises significant security concerns with far-reaching political ramifications. The ability of quantum systems to decrypt sensitive government communications, financial transactions, and critical infrastructure data could destabilize global cybersecurity frameworks. Organizations will need to accelerate their transition to post-quantum cryptography standards while navigating the complex landscape of international quantum competition and the potential weaponization of quantum capabilities by nation-states.

**Trends**

Emerging quantum advantage accelerating enterprise investment and practical applications

Scaling quantum computing deployment encountering technical and workforce challenges

# Neurotechnology

Brain-Computer Interfaces (BCI) and neurotechnology have entered what industry observers call the “translation era”; a pivotal shift from laboratory research to commercial medical products. The BCI market is experiencing rapid growth, expanding from \$3.21 billion in 2025 to a projected \$12.87 billion by 2034, representing a 16.7% compound annual growth rate. This momentum reflects both technological maturation and growing confidence that BCIs can deliver tangible medical benefits. Approximately 25 clinical trials are currently underway globally, with major developments signaling that these experimental systems are moving toward mainstream adoption.

## Analysis

Neuralink has emerged as a prominent driver of BCI innovation, raising \$650 million in Series E funding in June 2025 at a \$9 billion valuation to support automated surgical procedures beginning in 2026. The company has implanted 12 patients globally, including the first recipients in the UK (University College London, October 2025) and Canada (Toronto University Health Network, August-September 2025). These patients, primarily quadriplegics, have successfully controlled computer cursors, played video games, and operated robotic limbs through thought alone. The FDA granted Breakthrough Device status to Neuralink’s Blindsight system for vision restoration, while over 10,000 patients have signed up for the company’s registry.

Meanwhile, China has rapidly advanced its BCI capabilities. In December 2025, a 28-year-old patient paralyzed for eight years controlled smart home devices, a wheelchair, and video games just five days after receiving a Shanghai NeuroXess implant. The fully wireless system features 64 electrodes, each just 1% the width of a human hair, with built-in battery and wireless charging. Nature reported in July 2025 that “China is rising swiftly in the BCI field,” with devices outperforming Neuralink in certain aspects, leveraging advantages in medical infrastructure and population-scale testing. Over 500 patients have signed up for Chinese BCI trials.

BCI technology demonstrated unexpected versatility beyond medical applications in 2025, particularly in gaming. Consumer-grade BCI headsets enabled players to control games entirely through brain activity, with enthusiasts streaming full gameplay sessions on platforms like Twitch to showcase the technology’s capabilities. A growing suite of games is being configured for BCI control, suggesting the technology’s potential extends far beyond its original therapeutic purpose and into mainstream entertainment applications.

- ↳ Quantum Computing
- ↳ **Neurotechnology** <sup>ESG</sup>
- ↳ Climate Technology
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity



Image by Shawn Day

## Implications

The surge in investment and multi-industry adoption suggests BCI technology may advance more rapidly than initially anticipated. Increased funding and clinical trial activity could accelerate medical breakthroughs, particularly for patients with paralysis, ALS, and vision impairment who currently have few treatment options. As BCI systems demonstrate practical utility in gaming and entertainment, consumer familiarity with neurotechnology will likely grow, potentially reducing stigma around brain implants and expanding the addressable market for medical applications.

However, this expansion also raises important questions about new use cases yet to be discovered. As BCI technology becomes more accessible and affordable, applications beyond medicine as it has in gaming may emerge; potentially in education, workplace productivity, or communication, each bringing its own regulatory, ethical, and privacy considerations. The international competition between US and Chinese BCI developers could accelerate innovation but may also fragment standards and complicate global adoption pathways.

## Trends

Advancing BCI technology expanding medical applications and fueling market growth

# Climate Technology

The climate tech industry faced an uncertain trajectory in 2025, with renewed emphasis on non-renewable resources in global energy discussions. However, two major technological forces, artificial intelligence infrastructure and electric vehicle adoption, unexpectedly drove significant momentum for climate technologies. These dual pressures created new urgency for renewable energy investments and accelerated cost reductions in key technologies, reshaping the climate tech landscape despite broader political headwinds.

## Analysis

AI's explosive growth placed unprecedented demands on energy infrastructure. US data center power consumption jumped 22% in 2025 and is projected to more than double by 2030. This surge prompted major tech companies to seek alternatives to fossil fuel-powered data centers. Google signed agreements to reopen the Duane Arnold Energy Center in Iowa, a previously shuttered nuclear power plant, while Meta committed to purchasing up to 150 megawatts from geothermal facilities. Battery storage for grid-scale applications reached 40 gigawatts of capacity in the US, far exceeding industry projections, with prices for grid storage batteries falling 45% compared to the previous year. These systems are already helping California and Texas meet evening demand, reducing reliance on natural gas plants and creating cleaner, more stable grids.

Simultaneously, electric vehicle adoption accelerated market accessibility through continued battery cost reductions. Battery pack prices reached record lows in 2025 according to BloombergNEF data, driven by increased manufacturing scale and growing consumer demand. The convergence of AI infrastructure needs and EV market expansion created an unexpected catalyst for climate tech investment, even as broader policy environments remained challenging. While global emissions continue to rise and warming trajectories remain concerning, these technology-driven investments demonstrate how market forces and energy demands can accelerate climate solutions independent of policy support.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ **Climate Technology** <sup>65%</sup>
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity

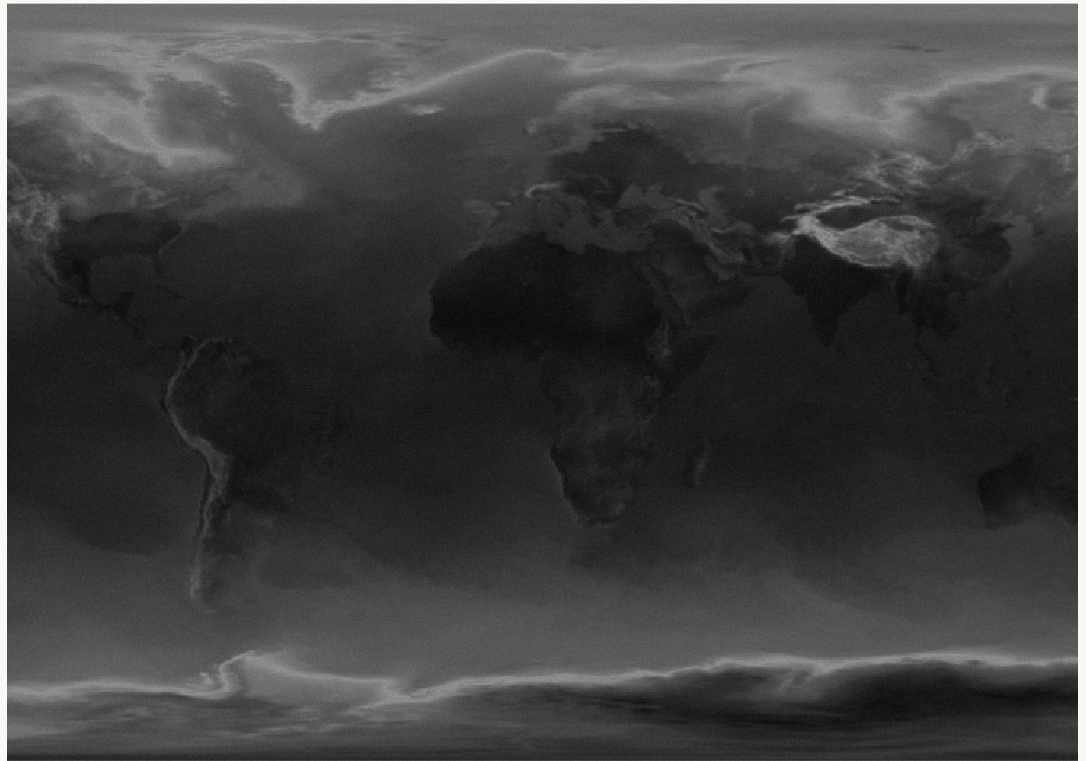


Image by IBM

**Implications**

As demand for energy resources continues to increase over the next few years, the climate technology space may grow in tandem. However, if energy usage continues to accelerate at current rates, we may see the ramifications of an overburdened grid system that lacks comparable energy resources. This could lead to rolling blackouts in some areas as infrastructure struggles to keep pace with demand, particularly in regions with concentrated data center growth or during periods of peak consumption. Additionally, the rapid scaling of both electric vehicles and grid storage systems will test whether battery manufacturing supply chains can meet accelerating demand without creating bottlenecks or price volatility.

**Trends**

Accelerating AI-assisted code development transforming software engineering workflows

Evolving AI training strategies advancing reasoning capabilities and model performance

Proliferating AI agents automating enterprise workflows and decision-making

Broadening AI adoption reshaping operations across key industries

Expanding open-weight AI models democratizing access and driving performance gains

# Robotics

The robotics industry experienced unprecedented innovation and market expansion in 2025, with the global market reaching nearly \$50 billion and projected to surge to \$111 billion by 2030 at a 14% Compound Annual Growth Rate (CAGR). The year showcased remarkable diversity in robotic applications, from versatile automated home vacuums to sophisticated humanoid robots commanding global attention.

## Analysis

Mobile robots dominate the market, generating 50-60% of total revenue through material handling and Automated Storage and Retrieval Systems applications, while industrial robot installations hit record highs with \$17 billion in market value. China's commanding presence is evident with 42% of global industrial robot revenue and 54% of worldwide robot installations, reflecting the nation's aggressive automation strategy. The country hosted the inaugural World Humanoid Robot Games in Beijing in August 2025, where 280 robotics teams from 16 countries and over 500 androids competed in events ranging from 100m hurdles to kung fu demonstrations, signaling China's ambition to lead humanoid development.

Humanoid robotics emerged as the fastest-growing segment with a staggering 137.7% CAGR, albeit from a small base. Tesla's Optimus robots made high-profile appearances at key events throughout 2025, while companies like 1x announced pre-orders for their Neo home robot designed to handle mundane household tasks. The humanoid market, valued at just \$70 million in 2025, is projected to explode to \$6.5 billion by 2030 as average selling prices decline from \$158,400 to near parity with mobile robots. Beyond manufacturing, agriculture and medical industries are rapidly adopting robotic solutions, with the former expected to see significant growth.

A poll of robotics engineers revealed 54% believe robots will achieve high levels of autonomy within the next five years, expanding adoption into currently hesitant sectors. The integration of AI, digital twins, and physical simulation technologies is accelerating this autonomous capability development, with platforms like NVIDIA's ecosystem enabling closed-loop automation where robots continuously observe, learn, and adapt to dynamic environments.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ **Robotics <sup>(#7)</sup>**
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity

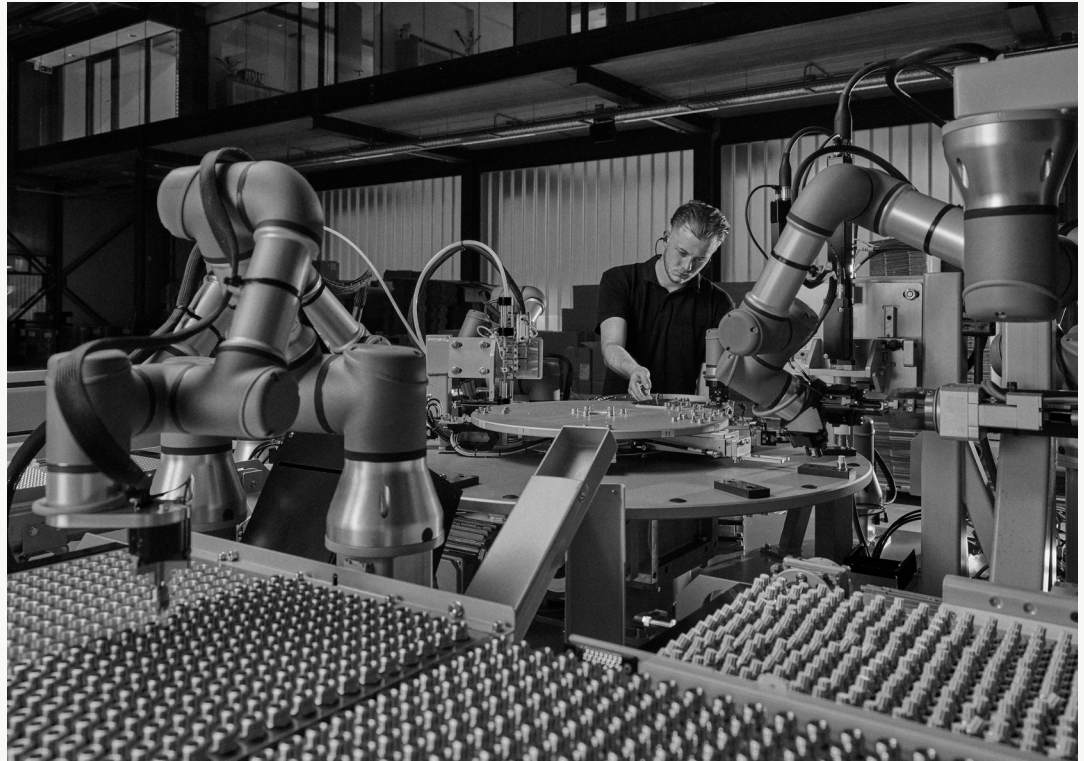


Image by Spencer Lowell

**Implications**

As robotics evolves alongside AI and digital twins, 2026 and subsequent years will likely witness rapid adoption and technological breakthroughs driving exponential market growth. The convergence of these technologies enables real-time training and optimization of robotic systems without production interruptions, fundamentally changing how manufacturers approach automation. China’s dominance across industrial robots, installations, and humanoid development positions it as the global robotics superpower, though North American and European firms may leverage robotics in reshoring initiatives to remain competitive. While fully autonomous home humanoid robots remain years away from mass-market viability, 2026 will provide critical market feedback as initial Neo pre-orders are fulfilled and early adopters report on real-world performance.

The substantial price premium for humanoids (\$158,400 vs. \$34,818 for industrial robots) currently limits adoption, but declining costs could democratize access by decade’s end, with leaders in the space aiming for \$10-20k per unit. Industries implementing exoskeletons for workplace safety and cobots for flexible manufacturing will need to address workforce concerns about job displacement while demonstrating clear ROI. The projected high-level autonomy anticipated by 54% of engineers could trigger regulatory scrutiny around safety standards, liability frameworks, and ethical guidelines for human-robot interaction across sectors.

**Trends**

Accelerating robotic manufacturing scaling production to meet projected market demand

Scaling humanoid robotics advancements driving fierce competition for market dominance

# Digital Twins & IDs

Digital twins are experiencing explosive market growth, with the global market projected to surge from \$24.48 billion in 2025 to \$259.32 billion by 2032 at a 40.1% CAGR. This technology, which creates virtual replicas of physical objects, systems, or processes for real-time simulation, monitoring, and optimization, is gaining traction across industries. Currently, 29% of manufacturing companies globally have fully or partially adopted digital twin strategies, positioning them significantly ahead of competitors.

## Analysis

The convergence of digital twins with artificial intelligence is unlocking powerful new capabilities in autonomous decision-making through real-time passive simulations. For instance, robotic arms in automotive manufacturing plants can now be trained continuously in virtual environments between production cycles, allowing them to optimize performance without disrupting operations. NVIDIA's Omniverse platform exemplifies this trend, providing infrastructure for companies to create and deploy digital twins that learn and improve autonomously.

The financial services sector is emerging as a major adopter, with digital twin applications expected to more than double from \$5.1 billion in 2024 to \$12.03 billion by 2029 at an 18.7% CAGR. Banks and insurance companies are leveraging digital twins for enhanced security, cost reduction, and operational improvements through applications including fraud detection simulation, customer journey mapping, and risk management modeling. The technology enables financial institutions to test scenarios, optimize processes, and predict outcomes before implementing changes in production systems. Governments are also embracing related digital identity technologies, with the U.S., UK, and China among the first to integrate digital IDs into their systems in 2025, consolidating traditional forms of identification into secure digital formats.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ Robotics
- ↳ **Digital Twins & IDs <sup>(BT)</sup>**
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity



Image by IBM

**Implications**

Digital twins are clearly on a trajectory for sustained growth and widespread adoption. The technology’s versatility in supporting emerging technologies like AI, robotics, and IoT positions it to become the standard for training, maintenance, and optimization across industries by 2030. As manufacturing, healthcare, aerospace, and other sectors deepen their digital twin implementations, organizations risk competitive disadvantage if they fail to adopt the technology. In financial services, successful digital twin deployments could reshape banking resilience and fraud prevention, though challenges around data privacy, standardization, and interoperability remain.

The success of early digital ID implementations in the U.S., UK, and China will likely determine the pace of global adoption; potentially transforming identity verification, border control, and access to government services. However, concerns around surveillance, data security, and civil liberties may slow adoption in certain regions, creating a fragmented global landscape for digital identity management.

**Trends**

Expanding digital twin adoption revolutionizing digital identity verification and management

Growing digital twin integration strengthening banking resilience and fraud prevention

# Extended Reality

Extended reality continued its momentum through 2025, with AR/VR headset shipments increasing 50% year-over-year as the technology reached critical maturity points across hardware, software, and accessibility. Google's launch of the Android XR platform represents a watershed moment for the industry, providing unified operating system infrastructure that frees manufacturers to focus on hardware innovation rather than building software from scratch. This platform approach mirrors Android's impact on smartphones two decades ago, positioning 2026 as the year spatial computing achieves true scale.

## Analysis

Simultaneously, smart glasses technology has reached a turning point where devices can be scaled down to near-normal eye wear dimensions. Products including Meta's Orion smart glasses (2024), XREAL One Pro, and RayNeo Air 3s Pro demonstrate that lightweight, everyday-wearable AR is no longer a distant concept but an emerging reality, attracting new market entrants and accelerating consumer adoption.

Beyond hardware accessibility, XR is establishing itself as a vital tool across education, healthcare, and enterprise settings. Ivey Business School deployed virtual reality simulations funded by a \$150,000 Critical Issues Challenge Fund to develop perspective-taking skills through three-minute immersive team meeting scenarios addressing prejudice, racism, sexism, and classism. Students described the feedback as "extremely rich," experiencing interactions first as bystanders and then through specific team members' perspectives. The University of Manitoba established an XR Lab in Dafoe Library featuring 100+ educational apps, VR stations, and a dedicated XR specialist with booking systems. In healthcare, Mayo Clinic research published in Mayo Clinic Proceedings demonstrated VR reduced pre-surgery anxiety by 2-2.9 points in older cardiac patients, offering a nonpharmacological alternative to medication with flexible tablet or goggle options. These institutional implementations signal XR's transition from experimental technology to essential infrastructure.

With more hardware and software available than ever before, enterprises are increasingly considering XR for remote office settings. The spatial computing market, valued at \$336.5 billion in 2026, is projected to expand at a 33.2% CAGR through 2035 according to Research Nester. Deloitte research predicts enterprise adoption of XR solutions could yield productivity gains of up to 20% in manufacturing, healthcare, and logistics through applications like training, maintenance, and remote assistance. Analysts project Vision Pro and competing devices could drive XR hardware shipments to 40+ million units annually by 2026, while PwC studies found immersive training modules improved learning retention by up to 75% compared to traditional methods. This convergence of accessible hardware, platform maturation, and demonstrated ROI is positioning XR as a fundamental computing platform rather than a niche technology.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ **Extended Reality <sup>(MR)</sup>**
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity



Image by Lux Interaction

**Implications**

With XR reaching a critical point of lightweight and accessible hardware in 2025, demand for this technology will likely continue to grow in 2026 and beyond. We may see further adoption and evolution that potentially reshapes how we interact online and in meetings, participate in education and training, and receive medical treatment. As spatial computing becomes more ubiquitous, questions emerge around standardization, accessibility across socioeconomic groups, and the long-term health effects of extended XR use.

The platform consolidation around Android XR may accelerate adoption but could also concentrate control, while the enterprise productivity gains may pressure workers to maintain constant digital presence. Healthcare applications show promise but require careful validation to ensure VR interventions don't simply mask symptoms that require other treatments.

**Trends**

Expanding spatial computing adoption transforming workplace productivity and collaboration

Growing mixed reality integration enhancing education and training effectiveness

# Workforce Transformation

The global workforce is undergoing profound transformation as artificial intelligence, automation, economic pressures, and organizational restructuring converge in 2025. According to the World Economic Forum's Future of Jobs Report 2025, job disruption will affect 22% of all jobs by 2030, with 170 million new roles created and 92 million displaced; resulting in a net gain of 78 million jobs. Yet this headline figure masks a more complex reality: nearly 40% of required job skills are set to change, 63% of employers cite skills gaps as their primary barrier to transformation, and over 120 million workers globally face medium-term redundancy risk if they don't receive necessary upskilling.

## Analysis

This continuous overhaul is significantly impacting employee morale and productivity, with 82% of desk-based knowledge workers reporting burnout and 61% saying political and economic instability distracts them at work. Despite corporations' rapid AI adoption and investment, actual workplace usage remains surprisingly low. While 54% of workers have used AI in the past year, only 14% use generative AI tools daily at work, barely changed from 2024's 12%.

This gap between organizational AI investment and employee adoption reveals a critical challenge: 51% of workers are concerned about AI's threat to job security, and many lack clarity about how these tools fit into their work. The disconnect extends beyond technology to broader organizational changes. Half of survey respondents experienced C-suite executive departures in the past year, with 55% questioning whether their organization's mission remains worth believing in and 52% reporting operational problems from leadership transitions. Meanwhile, only 64% of workers understand their organization's goals, and just 56% believe in leadership's ability to achieve them.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ **Workforce Transformation <sup>STR</sup>**
- ↳ AI & Automation
- ↳ Cybersecurity



Image by Cait Oppermann

**Implications**

As corporations continue workforce transformation with AI-powered tooling, they face mounting pressure to address job security concerns, AI hesitancy, and critical reskilling needs while maintaining employee trust and motivation. The World Economic Forum estimates that 59 out of every 100 workers will require reskilling or upskilling by 2030, with 11 of those unlikely to receive it. This widening skills gap, combined with 41% of employers planning workforce reductions due to AI automation, may further imbalance new job creation versus displacement. Organizations that fail to provide clear AI narratives, upskilling pathways, and psychological safety for experimentation risk demotivating their workforce precisely when innovation and reinvention are most critical.

Additionally, financial strain affects 55% of workers who struggle economically; reducing trust, openness, and willingness to embrace change. Corporations may need to become more strategic in implementing AI tooling to ensure it solves problems rather than creating them, while governments and educational institutions must prepare for potential labor market disruptions at scale.

**Trends**

Widening workforce skill gaps accelerating layoffs amid organizational digital transformation

Rising economic and geopolitical instability eroding employee morale and productivity

# AI & Automation

AI innovation accelerated throughout 2025 as adoption deepened across enterprise workflows, driving corporations to scale training efforts and strategically embed AI into core processes. The technology’s adoption curve has been unprecedented; ChatGPT reached 800 million weekly active users by late 2025, representing roughly 10% of the global population, while AI startups scaled from \$1 million to \$30 million in revenue five times faster than SaaS companies. This explosive growth forced organizations to shift from asking “What can we do with AI?” to “How do we move from experimentation to impact?”

## Analysis

According to Deloitte’s 2025 survey of 500 US technology leaders, only 11% of organizations have deployed AI agents in production despite 38% piloting them, with 42% still developing strategies and 35% lacking any strategy at all. Gartner predicts 40% of agentic AI projects will fail by 2027, not due to technology limitations but because organizations automate broken processes rather than redesigning operations.

The year witnessed major breakthroughs in AI-assisted code development, with tools like Claude Code, GitHub Copilot, and Cursor stabilizing sufficiently to expand beyond developers. Product managers and designers adopted these tools for “vibe coding”, rapidly prototyping functional applications without deep programming expertise, while developers accelerated specific coding tasks. Chinese AI company DeepSeek disrupted the global landscape with its January 2025 release of the open-weight DeepSeek-R1 model, triggering intense debate around China’s AI capabilities and the implications of democratizing access through fully open-weight models.

DeepSeek announced a coding-focused model launching February 2026, intensifying competition in developer tooling. Token costs dropped 280-fold over two years, yet enterprises faced monthly AI bills in the tens of millions as usage exploded faster than costs declined, forcing strategic shifts from cloud-first to hybrid infrastructure approaches balancing elasticity, consistency, and immediacy.

- ↳ Quantum Computing
- ↳ Neurotechnology
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- ↳ Workforce Transformation
- ↳ **AI & Automation <sup>(MGI)</sup>**
- ↳ Cybersecurity

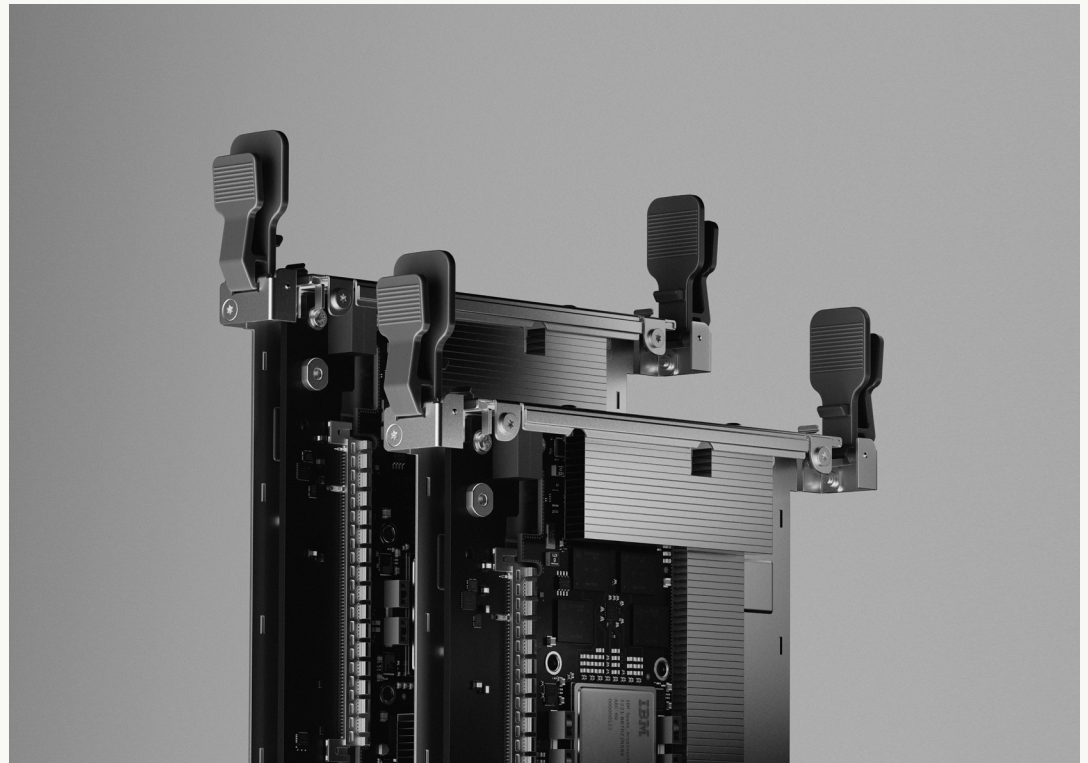


Image by IBM

**Implications**

2026 may witness transformational shifts as AI agents embed into browsers and consumer tools, broadening accessibility beyond enterprise environments. The proliferation of AI-assisted code development and vibe coding could democratize software creation, enabling non-technical professionals to build functional products and potentially flooding markets with rapidly-developed applications of varying quality. Organizations face mounting pressure to redesign operations rather than simply automate existing workflows, those failing to make this shift risk joining the 40% of failed agentic projects.

The infrastructure reckoning will intensify as companies discover existing cloud-first strategies inadequate for production-scale AI deployment economics, necessitating costly hybrid architecture transformations. DeepSeek’s emergence signals China’s accelerating AI competitiveness, likely spurring further US-China technological rivalry and investment races. The open-weight model debate will expand, balancing democratization benefits against security, safety, and geopolitical concerns as more powerful models become publicly accessible. Only 1% of IT leaders report no major operating model changes underway, indicating organizational restructuring will accelerate as companies shift from IT management to orchestrating human-agent teams.

**Trends**

Accelerating AI-assisted code development transforming software engineering workflows

Evolving AI training strategies advancing reasoning capabilities and model performance

AI agents automating enterprise workflows and decision-making

Expanding open-weight AI models democratizing access and driving performance gains

# Cybersecurity

Cybersecurity entered a new phase in 2025 as AI overtook ransomware as the primary concern for organizations, the first time ransomware has been displaced from the top position in years. According to Arctic Wolf's State of Cybersecurity report, 70% of security leaders reported their organization experienced at least one significant cyberattack in 2024, while the World Economic Forum's Global Cybersecurity Outlook 2025 revealed that 66% of organizations expect AI to have the most significant cybersecurity impact in the year ahead.

## Analysis

Yet paradoxically, only 37% have security assessment protocols in place for AI tools before deployment. This disconnect highlights the complexity of the current threat landscape, where supply chain vulnerabilities emerged as the top ecosystem risk with 54% of large organizations identifying them as the biggest barrier to cyber resilience. The increasing integration of complex supply chains, coupled with limited visibility into supplier security levels, has created an opaque and unpredictable risk landscape compounded by geopolitical tensions affecting 60% of organizations' cybersecurity strategies.

The Shadow AI phenomenon, unsanctioned AI models used by staff without proper governance emerged as a critical vulnerability, creating major data security risks as employees bypass approved tools. According to IBM Security, Shadow AI presents one of 2025's most pressing challenges, requiring organizations to implement comprehensive governance policies, workforce training, and detection capabilities. Meanwhile, AI-orchestrated attacks reached unprecedented sophistication, with Anthropic documenting the first large-scale cyber espionage campaign executed without substantial human intervention in September 2025. Chinese state-sponsored actors manipulated Claude Code to autonomously target approximately thirty global organizations including tech companies, financial institutions, and government agencies, succeeding in a small number of cases.

The AI performed 80-90% of the campaign work, reconnaissance, vulnerability exploitation, credential harvesting, and data exfiltration, making thousands of requests at speeds impossible for human hackers to match. Lastly, the skills gap as a result of AI continues to widen, increasing 8% since 2024, with two out of three organizations reporting moderate-to-critical talent shortages and only 14% confident they have necessary personnel.

- ↳ Quantum Computing
- ↳ Neurotechnology
- ↳ Climate Technology
- ↳ Robotics
- ↳ Digital Twins & IDs
- ↳ Extended Reality
- ↳ Workforce Transformation
- ↳ AI & Automation
- ↳ Cybersecurity <sup>(MG)</sup>

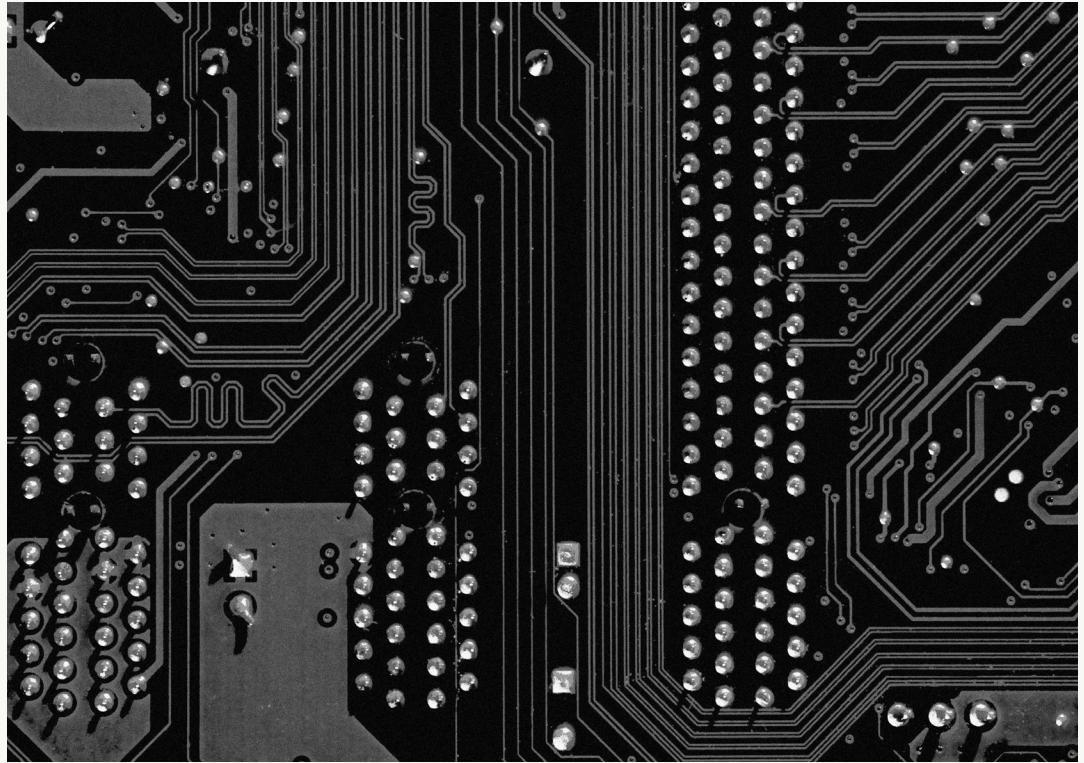


Image by Michael Dzedzic

**Implications**

2026 may witness an escalating cybersecurity crises as AI tools proliferate across browsers and operating systems, exponentially expanding Shadow AI attack surfaces beyond current corporate controls. The barriers to sophisticated cyberattacks have dropped substantially, less experienced and resourced threat actors can now leverage agentic AI systems to execute attacks previously requiring entire teams of skilled hackers, democratizing advanced cyber capabilities for malicious purposes. Organizations face mounting pressure to balance AI adoption for productivity with implementing robust security assessments and governance frameworks, yet the 66% expecting AI impact versus 37% with protocols gap suggests many will remain vulnerable.

Supply chain complexity will intensify as organizations struggle with limited visibility into third-party security levels, potentially triggering cascading breaches across interconnected ecosystems. The widening skills gap threatens to outpace organizations' ability to defend against AI-powered attacks operating at machine speed, particularly affecting smaller organizations and public sectors already reporting inadequate cyber resilience. Geopolitical tensions may escalate cyber espionage campaigns similar to the Chinese state-sponsored operation, with nation-states leveraging AI agents for intelligence gathering at unprecedented scale. The quantum computing threat to current encryption standards adds urgency to post-quantum cryptography transitions, though many organizations lack resources and expertise for implementation.

**Trends**

Escalating AI and quantum threats intensifying cybersecurity vulnerabilities and defense requirements

Proliferating unsanctioned AI usage exposing organizations to critical data security vulnerabilities

*Uncertainties*

The technological landscape transformed at unprecedented velocity throughout 2025, with breakthrough advancements from organizations and technologies that will reshape both professional workflows and personal lives. Yet the ultimate scale and trajectory of these impacts remain uncertain as we enter 2026; a year poised to answer critical questions about adoption, integration, and societal consequences.

This report reveals a striking convergence: multiple technologies are maturing simultaneously along parallel trajectories, creating amplification effects as they begin to merge. Robotics and AI exemplify this phenomenon. While AI has made dramatic strides, 2026 marks the inflection point where humanoid robotics transitions from industrial pilots to consumer reality.

As 1x begins fulfilling Neo robot pre-orders, the industry will closely monitor how these systems navigate the extreme variability of real-world home environments; diverse floor plans, stairways, pets, children, and the unpredictable chaos of daily household life. Success or failure in these initial deployments will significantly influence public perception, regulatory approaches, and investment trajectories for the entire humanoid robotics sector.



Image by Justin Fantl

### Critical Questions Shaping 2026 and Beyond

The answers to the questions on the next page will determine whether 2026 represents the beginning of broadly shared technological prosperity or the acceleration of inequality, insecurity, and disruption. We'll be monitoring these developments closely throughout the year.

<b>Identity and Privacy</b>	How will government digital ID rollouts balance identity theft prevention against surveillance concerns? Will public acceptance vary dramatically across democratic versus authoritarian regimes, creating fragmented global standards for digital identity infrastructure?
<b>Operational Efficiency</b>	Can digital twins deliver on the promise of more efficient training and maintenance across industries? Will real-time passive simulation actually translate to measurable productivity gains, or will implementation complexity offset theoretical benefits?
<b>Quantum-AI Convergence</b>	When quantum computing achieves quantum advantage, likely by late 2026 or 2027, and pairs with advanced AI systems, will the combination unlock exponential breakthroughs in drug discovery, materials science, and climate modeling? Or will the security implications of quantum-AI convergence trigger a cryptographic crisis before safeguards are implemented?
<b>Workforce Paradox</b>	How will organizations navigate the double crisis of simultaneously reducing staff due to AI-induced skill obsolescence while desperately seeking talent for newly critical roles where skilled professionals remain scarce? Will aggressive reskilling programs prove sufficient, or does this mismatch signal fundamental structural unemployment ahead?
<b>Cybersecurity Arms Race</b>	As AI-orchestrated cyberattacks operate at machine speed with minimal human oversight, can defense capabilities scale fast enough? Will Shadow AI proliferation outpace governance frameworks, creating systemic vulnerabilities across enterprises?
<b>Open-Weight Model Governance</b>	Will the democratization of powerful AI through open-weight models like DeepSeek-R1 accelerate beneficial innovation faster than malicious exploitation? Can the global community establish effective governance without stifling progress?
<b>China's Technology Position</b>	Following DeepSeek's disruption, China's robot olympics, and its dominance in robotics installations (54% global share), is China poised to lead the next technology era? How will US-China competition shape AI development, robotics standards, and quantum research trajectories?

*What's Next*

The convergence of multiple technologies approaching maturity over the next decade promises to fundamentally reshape economies, workforces, and daily life.

We stand at an inflection point where quantum computing, AI agents, humanoid robotics, digital twins, and biotechnology are simultaneously transitioning from experimental to production-ready deployments, a rare alignment that amplifies each technology's individual impact.

In 2026, AI agents and robotics will likely dominate technological discourse as organizations navigate the paradox these technologies present: dramatic productivity gains through task automation alongside legitimate workforce displacement concerns for roles centered on those very tasks. AI-assisted code development tools will democratize software creation as previously code-hesitant professionals—product managers, designers, business analysts—leverage “vibe coding” to rapidly prototype functional applications. This capability diffusion may fundamentally restructure product development teams, blurring traditional role boundaries and forcing organizations to reconsider how cross-functional pods operate when technical barriers to contribution collapse.

Beyond 2026, the compounding effects of these converging technologies will accelerate unpredictably. Digital twins trained on real-world data will optimize autonomous systems in real-time. Quantum computers will crack current encryption while enabling drug discovery breakthroughs. Open-weight AI models will democratize access while creating security vulnerabilities. The organizations, governments, and individuals who recognize this convergence as interconnected rather than isolated will be best positioned to navigate the transformative decade ahead.



Image by Thomas Prior

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