

**FUTURE  
INVESTMENT  
INITIATIVE**  
Powered by the FII Institute

**7<sup>TH</sup>  
E D I T I O N**

October 24–26, 2023

# THE NEW COMPASS



King Abdulaziz International Conference Center  
Riyadh, Saudi Arabia

# FUTURE INVESTMENT INITIATIVE, 7TH EDITION: THE NEW COMPASS

As the world continues to experience widespread socioeconomic and geopolitical transformations, the movement towards a New Global Order continues to inspire the future of business, finance, and international investment. In this new order, centuries-old economic models start to unravel while new systems and frameworks begin to take shape. These uncertain times require different perspectives, smarter tools, and more visionary leadership to help chart new directions towards a more prosperous future for all.

Against this backdrop, The Future Investment Initiative (FII) Institute presents “**The New Compass**” – an interactive program designed to help investors recalibrate the pathways for their companies and for the global economy, while developing new strategies for understanding the greatest challenges and opportunities of this new era. Now in its 7th Edition the FII invites the world’s leading investors, business leaders, policymakers, inventors, and explorers to come together to discover the new markets and navigate new frontiers of economic growth and prosperity.

## THE JOURNEY TO THE NEW COMPASS

In October 2017, the Future Investment Initiative (FII) launched in Riyadh under the theme of “The Big Shift,” to explore the large-scale transformations underway across the global economy – as a result of the new emerging geographies of investment and innovation. The devastation of the pandemic inspired a Neo-Renaissance, accelerating the world’s transition to a New Global Order, which is now taking shape. How will investors and business leaders navigate the great challenges and even greater opportunities of the 21st century? For FII7, the Future Investment Initiative Institute presents the theme of “The New Compass” to help leaders and explorers chart a new path toward a brighter future for all.





## A COMMUNITY OF EXPLORERS



Heads of State



CEOs



Policymakers



Leaders in Finance  
and Investment



Youth



Heads of Multilateral  
Institutions



Founders and  
Entrepreneurs



Academic Experts  
and Scientists



Futurists and  
Visionaries



Media

## FII INSTITUTE MEMBERSHIP

For the first time, access to the FII flagship conference will be exclusively reserved for our members :



### Access unparalleled intelligence

Priority access to a knowledge platform with reports and research papers from renowned partner universities and independent organizations.



### Connect with the right people at the right time

Access to the global network of high-level FII events to debate, discuss, and hear global CEOs, government stakeholders, and industry leaders.



### Anticipate and participate in the next world-changing idea

Become part of cutting-edge critical innovations through the FII investment arm by backing great opportunities.

## PROGRAM FRAMEWORKS



# PHASES OF DISCOVERY



**DAY 1,  
October 24**

## Navigating New Norms

Day 1 will delve into the critical trends shaping global business, investment, geopolitics, and geoeconomics. Speakers will examine the rapid and volatile changes in the world's markets, banking crises, high inflation, and the emergence of economic fragmentation. In addition, they will analyze the global energy transition – a transformative movement with far-reaching implications for every sector.



**DAY 2,  
October 25**

## The New Vision Manifest

Day 2 will highlight emerging economies, new middle powers, and critical climate solutions. Featuring our FII PRIORITY Summit and the key elements that affect quality of life, speakers will debate the future of work, living, health, education, sport, culture, and tourism.



**DAY 3,  
October 26**

## Exploring New Frontiers

Day 3 will highlight the new frontiers of investment and technology, with a focus on space & aviation, biotech, cybersecurity, robotics, venture capital, startup nations, and more. Featuring an AI Summit and a special session highlighting the Global South's Road to COP28.

# SUMMITS FOR A NEW WORLD

Centered around three of the most urgent topics for the future, FII 7's summits navigate critical issues in an engaging, fast-paced format.

### SUMMIT I:

## Energy's Critical Mass

The energy transition goal requires a tripling of clean energy infrastructure investment by decade's end, but geoeconomic and geopolitical tensions complicate the global calculus. How can leaders balance optimizing capital mobilization and pursuing newfound opportunities with their obligations to humanity's future?

### SUMMIT 2:

## FII Priority

powered by FII Institute

What is humanity's top priority? In line with our mission to create positive impact on humanity, FII Institute's second annual FII PRIORITY report aims to uncover the needs, wants, hopes, and expectations of every individual across demographics, across generations and across the world.

### SUMMIT 3:

## Generation AI

Generative AI has sparked a rush of innovations, legal considerations, and questions from risk management to national security. How is AI transforming humanity's fabric – and can it be leveraged for the greater good?

### SPECIAL TOWN HALL – POWERED BY THE PUBLIC INVESTMENT FUND

## The Carbon Coefficient

The world's leaders are pushing for 29x growth in carbon capture by 2030. Which global initiatives can turn carbon from an economic externality to a common commodity?

# NAVIGATING THE AGENDA

## Geoeconomics

### NEW GEOECONOMICS STRATEGIES

FDI flows now concentrate within blocs of aligned countries, contributing to a potential 2% long-term global output loss. How can leaders adeptly balance strategic motivations with economic consequences?

### RISE OF THE MIDDLE POWERS

Global economic power is shifting from advanced economies towards emerging Middle Powers like Brazil, Saudi Arabia, India, Indonesia, and Turkey. How will their rise impact the ever-evolving global landscape?

### THE HYBRID ECONOMY

The Hybrid Economy dissolves boundaries across borders, sectors, technologies, work styles, and the physical and virtual realms, unlocking limitless possibilities. Will this versatile economy become the new norm, paving the way for a prosperous future?

### INFINITE INFLATION?

The U.S. Labor Report reveals a 6% annual inflation rate in March 2023. How can both investors and households navigate adapt to these challenging conditions while searching for light at the end of the tunnel?

## Leadership

### REWRITING THE RULE OF LAW

Preserving rule of law and maintaining democratic values are as essential to a prosperous business environment as promoting justice reforms and innovation. Is resilience dependent on those who can rise to the challenge of balance?

### THE TRUE NAVIGATORS

Resilient and agile leaders capable of navigating uncertainty and risk are crucial unprecedented turbulence. Who are the true navigators and what sets them apart?

## Innovation Ecosystems

### VC IN 2024

Venture capital investments sharply declined from \$162 billion in Q1 2022 to \$76 billion in Q1 2023. Is the drop momentary, or indicative of a systemic shift?

### NEW STARTUP NATIONS

How will the rise of entrepreneurial ecosystems in countries like Indonesia, Turkey, India, and Mexico - where over 10% of adults are engaged in companies less than 3.5 years old - impact global innovation and economic development?

## Finance & Investment

### INVESTING THROUGH VOLATILITY

Global private equity is projected to decline by 15% in 2023. Which strategies can ensure investment resilience through a volatile market ahead?

### THE NEXT MODEL FOR GLOBAL BANKING

The recent collapses of Signature Bank, Silicon Valley Bank, and Credit Suisse - a storied bank with over \$500 billion in assets - evoke Lehman Brothers' 2008 bankruptcy. Can a new model for global banking mitigate seemingly cyclical failures?

## Geopolitics

### INTRODUCING THE P20: THE 20 MOST POWERFUL COUNTRIES IN THE WORLD

Rankings like the G20 overlook factors such as technology and innovation, sovereign wealth, soft power, and environmental stewardship - so how can leaders develop metrics to accurately rank the P20, or the Power 20, reflecting the true multifaceted nature of influence in today's world?

### DEMOCRACIES NOW

Democracies worldwide declined from 96 electoral democracies in 2016 to 90 in 2022, with half of the world's democratic governments in retreat. What factors contribute to this regression, and how can institutional innovation and global cooperation counteract the trend?

### CHINA STEERS THE WORLD

China's economy grew 4.5% in the first quarter of 2023, resurging the fastest and longest period of economic expansion in history. What does the future hold for China?

## Crypto, Currency & Commodities

### THE PROLIFERATION OF CURRENCY

Regional integration, geoeconomic initiatives like a new BRICS currency, the decline in global reserves held in U.S. dollars, and cryptocurrencies are all on the rise. How will the proliferation of new currencies impact global trade and economic dynamics?

### CRYPTO VS. COMMODITY

Inflation and market volatility are driving interest between traditional commodities and the expanding crypto market, which now boasts over 420 million users worldwide. How do investments in cryptocurrencies compare to commodities as assets during these uncertain economic times?



# NAVIGATING THE AGENDA

## Water & Food Nexus

### WATER: BLUE GOLD

2.2 billion people lack access to safely managed drinking water services and 2 billion face high water stress. Will new technologies allow governments, businesses, and organizations to find optimal yet profitable ways to secure water for all?

### FIXING THE FUNDAMENTALS

In 2022, droughts imperiled over 5 million people in Somalia and over 32% of land in the western U.S. experienced extreme drought. Which water solutions can ensure food security in the face of escalating climate change?

## Energy Transition

### REBALANCING THE GLOBAL ENERGY EQUATION

Fossil fuels make up 80% of energy sources, but renewables are predicted to reach 90% by 2050. Which current developments are poised to recalibrate the global energy landscape?

### BUILDING BETTER BATTERIES

The global energy storage market is projected to reach \$24.31 billion by 2027. How will emerging technologies improve energy storage efficiency, and how do the geopolitics and geoeconomics of rare earth minerals affect the sector?

### THE SOLAR HORIZON

The world's largest solar-power plant is being built in Saudi Arabia just as renewables must triple by 2030 to meet climate goals. How can investors support solar power in diverse climates, and what is the future of solar energy globally?

## Media

### THE BIG SHORT

Short-form video content is now the main mode of media, evident with TikTok's 780 million daily active users and with the 30 billion daily YouTube Shorts views. Are business, government, and cultural leaders properly embracing this new norm?

## Quality of Life

### A HOME FOR ALL

The World Bank predicts 1.6 billion people could face housing shortages by 2025. Can innovative technologies like 3D printing, prefabrication, modular construction, and AI revolutionize the home construction industry to address these challenges?

### REINVENTING HAPPINESS

The 2023 World Happiness Report crowned Finland as the happiest country for the sixth straight year. How can investment in factors like social safety nets and political stability influence happiness?

### ARCHITECTING HUMAN PROGRESS

Vienna consistently tops the Global Livability Index. But can leaders create a new measurement that captures the complexity of modern quality of life, including factors like diversity, professional opportunities, and access to global culture?

## Demographic Shifts

### CATCH-22: PEOPLE WITHOUT JOBS & JOBS WITHOUT PEOPLE

By 2050, one in six people will have aged out of the labor force globally—and half of workers who remain in the workforce will find that their jobs have been replaced by automation and robotics. What will become of the world's economies, labor markets, and social structures?

### THE END OF RETIREMENT

52% of people in the world are pessimistic about the ability to retire. Is it time to redefine the 20th-century vision for retirement?

## Defense & Cyber Security

### THE FUTURE OF DEFENSE

The world contains 9.7 billion devices and will have more than 29 billion by 2030. Can human-centric design practices be the bulwark to geostrategic vulnerability?

# NAVIGATING THE AGENDA

## Health & Biotech

### TOWARDS TRANSHUMANISM

The global human augmentation market will reach over \$100 billion by 2026. How will human augmentation technologies impact society, ethics, and the future of the human experience?

### THE NEXT PANDEMIC: FUNGI

Over 300 million people suffer – and over 1.5 million people die – from fungal infections each year. How can the global health community combat the unique challenges posed by widespread and deadly fungal infections, before it becomes too late?

### DR + AI + ML

The global telehealth market will reach \$455.3 billion by 2030, just as robotic telesurgery also rapidly expands. How will these innovations reshape healthcare access and delivery for patients and professionals?

### HACKING HUMAN EVOLUTION

The CRISPR technology market will reach \$9.2 billion by 2027, and new gene-editing advancements continue to emerge, like the ability to insert any genetic sequence at any genome location. Will cutting-edge innovations reshape human evolution?

### THE WAY TO BREATHE

99% of the global population breathes air below WHO quality guidelines and pollution leads to 8.8 million deaths annually. Can new solutions through AI and satellite technology yield effective results?

## Climate

### CIRCULAR ADAPTATION

The World Meteorological Organization warns of a 40% rise in natural disasters by 2030, while \$340 billion annually is needed for adaptation measures. How can investing in climate change adaptation and a circular economy boost resilience?

## AI

### IGNITING A REVOLUTION

AI threatens two-thirds of all jobs but can potentially boost global GDP by 7%. Is humanity facing a civilization-wide turning point?

### MAN VERSUS MACHINE

Automation will displace between 400 and 800 million individuals by 2030 – but will generate up to 22% cost savings for businesses. How can leaders balance workforce stability, AI innovation, and financial gain?

### PRODUCTIVITY REWIRED

The global robotics market is projected to reach \$73 billion by 2025, with an impressive CAGR of 22.3%. How will cobots and robot swarms impact the future of human productivity?

## The Value of Education

### DISMANTLING IVORY TOWERS

The U.S. spends \$30,000 per post-secondary student and the global average is at \$16,100, yet access to free education resources online has never been more prevalent. Can the vast availability of virtual learning opportunities lead to an affordable and universal global education system?

## Space

### SPACE IS MODULAR

The \$350 billion global space industry moves towards a modular approach as smaller companies from all corners of the world begin to take the lead. Which new sectors and regions promise the most opportunities?

### HARNESSING THE NEXT SUPERPOWER: SPACE

As the race for space exploration and commercialization accelerates, nations and corporations alike are vying for dominance in this new frontier of scientific discovery and economic growth. How will the competition over space define the next public and private space superpowers?

## ABOUT FII INSTITUTE

The Future Investment Initiative (FII) Institute is a global nonprofit foundation driven by data with an investment arm and one agenda: Impact on Humanity. Global and inclusive, the Institute fosters great minds from around the world and turns ideas into real-world solutions in four critical areas: Artificial Intelligence (AI) & Robotics, Education, Healthcare and Sustainability.

### VISION



Bringing together the brightest minds and most promising solutions to serve humanity

### MISSION



Creating a purposeful present, promising future

## BOARD OF TRUSTEES

FII Institute is governed by an independent Board of Trustees of civic leaders, entrepreneurial pioneers, and noted academics entrusted with guiding and empowering the Institute to achieve its mandate from strong ESG foundations in service of humanity.



**H.E. Yasir Al-Rumayyan**

Governor of the Public Investment Fund;  
Chairman of FII Institute



**H.R.H. Princess Reema  
Bint Bandar Al Saud**

Saudi Ambassador to the United States of America



**Sen. Matteo Renzi**

Senator of the Italian Republic;  
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**Professor Adah Almutairi**

Professor & Co-Director of the  
Center of Excellence in Nano-  
Medicine & Engineering,  
University of California San Diego



**Richard Attias**

CEO of FII Institute;  
Executive Chairman of RAGA

## INITIATIVES



**FII PRIORITY Report**



**Inclusive ESG  
Methodology**



**GIDI Index**



## FII INSTITUTE NUMBERS OVER THE PAST 3 YEARS

**13**

INTERNATIONAL  
EVENTS

**2,200+**

SPEAKERS

**22,000+**

DELEGATES

**21**

STRATEGIC  
PARTNERS

**7**

INVESTMENTS

**43**

PUBLICATIONS

**40+**

PODCASTS

**5**

ACADEMIC  
PARTNERS

**\$109B**

WORTH OF  
AGREEMENTS

## FII INSTITUTE'S GLOBAL REACH



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### Vision Partner



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سابك  
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شركة الاستثمارات  
SAMAB INVESTMENTS

شركة الكهرباء  
Saudi Electricity Company

SNB

SoftBank Vision Fund

standard  
chartered

STATE STREET

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ثقة

VISION

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