

Hillary, Jeb, Facebook and Disorder

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For a presidential campaign that has started so early, it's striking how little most of the candidates want to engage with major issues of the day, let alone the future. Hillary Clinton won't take a clear stand on two big issues she helped to negotiate as secretary of state: the free-trade deal with Pacific nations and the nuclear deal with Iran. Jeb Bush's campaign seems stuck on whether he is or is not his brother's keeper. Marco Rubio was for comprehensive immigration reform before he was against it. While Senators Rand Paul and Bernie Sanders are motivated by clear ideologies, the others, so far, evince much more compelling ambitions to be president than compelling reasons for why they should be.

That can't last. Just follow the headlines. We're in the middle of some huge disruptive inflections in technology, the labor market and geopolitics that will raise fundamental questions about the future of work and the social contracts between governments and their people and employers and employees. These will all erupt in the next presidency.

What are the signs of that? Well, my candidate for best lead paragraph on a news article so far this year goes to Tom Goodwin, an executive at Havas Media, whose essay March 3 on Techcrunch.com began: "Uber, the world's largest taxi company, owns no vehicles. Facebook, the world's most popular media owner, creates no content. Alibaba, the most valuable retailer, has no inventory. And Airbnb, the world's largest accommodation provider, owns no real estate.

Something interesting is happening.”

There sure is. We're at the start of a major shift on the question of what's worth owning. What all of the above companies have in common is that they have either created trust platforms that match supply and demand for things people never thought of supplying: a spare bedroom in their home or a seat in their car or a commercial link between a small retailer in North Dakota and a small manufacturer in China. Or they are behavioral platforms that spin off extremely valuable data for retailers and advertisers or they are behavioral platforms on which ordinary people can generate reputations — for driving, hosting or any skill you can imagine — and then market themselves globally.

This is a result of the exponential growth in computing power, storage, networking, sensors and software generation and interoperability, which is allowing us to both gather massive amounts of data and apply software to that data to see patterns at a speed and scope unknown before. And it is taking friction out of so many things at once: from hailing a cab to reserving a room in someone's home in Timbuktu to buying groceries to learning from anyone anywhere to designing an airplane part on a 3-D printer in a week instead of six months. Complexity is becoming free.

A recent study by the Oxford Martin School concluded that 47 percent of U.S. jobs are at high risk of being taken by smart machines and software in the next two decades. And what is interesting, notes James Manyika, a director of the McKinsey Global Institute and co-author of “No Ordinary Disruption,” is that, contrary to expectations, “knowledge workers at the middle and the top” may be more threatened than those doing physical work. For example, The Associated Press now uses computers, not reporters, to generate more than 3,000 financial reports per quarter. This can free up workers to do more creative work, but they have to be trained for it.

On geopolitics, we still have great power rivalries, but the most relevant divide in the world will no longer be East-West, capitalist-communist. It will be the World of Order versus the World of Disorder, as environmental, sectarian and economic pressures are pulverizing weak and failed states. Every day now you read about people fleeing the World of Disorder for the World of Order. Rohingyas, a mostly

Muslim group, from Myanmar and Bangladesh are trying to get into Thailand and Malaysia; Africans and Arabs are trying to cross the Mediterranean to Europe; Central American parents have sent thousands of their kids to the United States. Israel's government has started sending letters to 45,000 Eritrean and Sudanese refugees — who walked, rode and sailed to Israel in search of order and work — telling them they have 30 days to accept \$3,500 in cash and a one-way ticket home or to an unnamed third country in Africa or face prison, **The Washington Post reported** last week. Last year, the U.N.'s refugee agency said there are more displaced people worldwide — some 50 million — than at anytime since World War II.

But here's the rub: We don't know what to do. We used to rely on empires, colonizers and dictators to control a lot of these places, but we're now in a post-imperial, post-colonial and, in many places, post-autocratic age. No one wants to touch these disorderly zones because all you win is a bill. And most are incapable of democratic self-governance. Who will control these areas? What if the answer is nobody? It will be one of the big leadership challenges of the next decade.

So, to paraphrase Trotsky once more: Our presidential candidates may not be interested in talking seriously about the future yet, but the future will be interested in talking to them.

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