



Futurescape 23 – Fast Future’s 100 Predictions for 2011-2012 – Part 2 – Big Conversations

Welcome to the latest edition of FutureScape in which we share the next set of our 100 predictions for the world in 2011-2012. As always we welcome your feedback and contributions to future newsletters.

The feedback on our increased level of activity on Twitter has been excellent and we now have over 2000 followers.

In response to demand from our followers we’ve also launched two new tweet streams -

<https://twitter.com/#!/FutureAviation> on the future of airlines and airports.

<https://twitter.com/#!/FutureofTravel> on the future of travel and tourism.

Copies of previous editions of the newsletter can be downloaded [here](#).

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Watch a short video of Rohit’s keynote speech on global trends [here](#)

1. Please take our current Convention 2020 survey on the Future of Corporate and Association Meetings and Conventions

We are interested in the views both of those who attend business events as delegates and of those who work in the meetings industry. The survey explores key trends driving the future design of these business events. It then goes on to explore the implications for event strategies, financing, meeting design, delegate experience, use of social media, technology and knowledge management.

You can find the survey here: <http://www.zoomerang.com/Survey/WEB22D832TC536>

Please share the link with colleagues who might be interested. Everyone who leaves their email address will receive a copy of the final report. The emerging findings will be presented at the following industry events:

Imex Las Vegas - October 11th - 13th 2011 <http://www.imexamerica.com/>

The ICCA Congress in Leipzig - October 22nd - 26th
2011 <http://www.iccaworld.com/dbs/congress2011/>

The EFAPCO Congress in Estoril - January 12th - 14th
2012 http://www.efapco.eu/events/the_5th_congress_2012_estoril_portugal

The survey closes on November 30th 2011. Thank you in anticipation of your support.

2. Presentations at Imex Las Vegas

I am going to be delivering a number of presentations sharing different aspects of the findings of the Convention 2020 at Imex Las Vegas 11th-13th 2011. A full list of sessions and locations is presented at the end of this email. I hope to see some of you there – please do take the time to introduce yourself.

3. Forthcoming Events

Readers have been asking us to share more information on forthcoming events we are participating in or speaking at. Here is a selection:

[Facilitator Training - Designing and Leading Effective Meetings](http://www.eventbrite.com/event/2201540868) - Wednesday, October 19, 2011 9:30 AM to 4:00 PM (GMT) – Centre for Economic and Social Inclusion London UK £115 <http://www.eventbrite.com/event/2201540868>

This facilitation training programme is led two of the best facilitators I know - Virginia Hamilton and John Baker and is offered at the incredibly low price of £115. I am already committed that day but David from our team will be taking the training and we are encouraging everyone we know to attend if they want to develop their facilitation skills. This is how Virginia and John describe the course: *“This training is for people who want improve the quality of meetings and events, help people listen to each other with trust and respect,*

help build shared awareness of any problem or task, increase participation, get more value for the time spent, and convene deep conversations that lead to change.”

For a full course outline please contact Virginia Hamilton at vahamilton@mac.com

[Global Airport Development Conference Barcelona](#) November 7th – 11th 2011

I will be delivering a keynote speech on Airport 2020 and running a workshop on developing future airport strategy.

[NextGen 11 – The Role of Broadband in Future Economic Growth and Innovation](#) November 15th- 16th 2011 Bristol UK

I will be delivering a session on the role of broadband in driving the next generation of growth industries.

Awards Contest. NextGen are running an awards competition to acknowledge achievements in developing and deploying better broadband. They are focusing on three categories of broadband activity – I) innovative funding solutions, II) rural leadership and community development and III) collaboration. Details can be found [here](#) and entries must be submitted by October 14th 2011. Good luck.

[IQ2 If Conference - The future of architecture, dreams, walls, life and more...](#) November 25th- 26th 2011 London, UK £299+VAT

This is one of those events I'd pay to attend even if I wasn't speaking – the line up promises a feast of brainfood. I am delivering two keynote sessions on:

- *Electronic Highs and Virtual Lows - the digital future of narcotics*
- *Virtual Experiential Travel*

We have negotiated a 20% discount for the first five of our readers who book tickets for the event. Just click on the TX tickets link from the home page and then enter the code TALWAR when prompted.

<http://iq2ifconference.com/tickets.html>

Association CEO Workshop - Developing Future-Proofed Strategies –December 15th 9am – 2pm London UK

We are partnering with Kellen Europe to run a workshop aimed at association CEO's to help them understand the drivers of change and develop future proofed strategies for their organisation. This will be a highly interactive and fast paced workshop. The session is being hosted by the QEII Conference Centre London. If you would like to know more about the event or are interested in sponsorship opportunities, please contact Rohit Talwar

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4. Estonian Development Fund - Asia Foresight Workshop

One of the most enjoyable aspects of being a futurist is running workshops that help you see the world through other people's eyes. The latest of these last Friday was truly exceptional in terms of the level of participant engagement, the passions generated, the quality of the discussion and the value of the ideas that emerged. I was invited by Arengufond - the Estonian Development Fund - to run a cross-sectoral workshop to help Estonia explore how it should respond to developments in Asia. Participating were Estonian MP's, senior civil servants from the Prime Minister's office, and the economic and foreign ministries, local business people, academics and Arengufond. Estonia's recent history as part of the former Soviet Union has a clear bearing on how it views its future and leads to a strongly expressed desire to maintain political and economic independence.

The session started with a context setting presentation from me to a larger forum of around 35 people. The talk looked at key drivers and possible scenarios for Asia over the next decade. The bulk of the time was then spent with a core of 21 people who stayed on to develop and discuss a range of possible Asia strategies for Estonia – ranging from no explicit engagement to serious courtship. The resulting outline strategies explored issues as diverse as Estonia's economic priorities, educational implications, natural resource protection, cultural legacies, human rights, the pace of change and the role of diplomacy.

For me the most exciting and encouraging elements were the level of openness and engagement across all of the stakeholder groups involved and the willingness to discuss the undiscussable on a range of topics. This was especially impressive given the presence of national politicians – which can put a break on proceedings.

This is very much the start of the process of exploration and very soon we'll be sharing both the scenarios and workshop outputs in order to solicit views and feedback from across the globe.

5. Conference Curation – an Under-rated Art

A key finding from our Convention 2020 research on the future of business events is the growing importance of the role of the 'conference curator' in the design and delivery of the event. I recently witnessed the power of world class curation in action. [The Future Travel Experience Conference](#) in Vancouver this September was probably the best designed event I've attended in the last decade from a content and learning perspective. Barring the keynotes (of which I was one), the other speakers had 10-20 minute slots to get their message across.

Each speaker was heavily briefed by the conference director (the curator) over a period of several months with precise guidance on the aspects of their work to be shared. The presentations were delivered in related theme clusters – with strong moderation and no break outs. The speakers were largely drawn from airlines and airports and each shared real insights into their strategies and the practical actions they were taking to implement them. An audience of their peers pushed hard in the Q&A sessions, and the level of audience engagement suggested real learning was taking place. The conference is supported by a

regular publication and Twitter stream which share content that make very clear the forward looking focus of the conference. As a result, anyone not talking about the future and how they were preparing for it would have looked very out of place.

Many conferences would claim to adopt a similar approach, however what stood out here was the level of preparation and industry insight that had gone in to ensuring an excellent outcome. This was something many delegates commented on when we discussed what made the event such a success. In many respects the conference design went against all the 'received wisdom' about how to design and deliver a personalized event experience. However, the quality of the content, learning and delegate interactions suggest that there is still room in the world for well-designed events delivered in a traditional format.

6. Fast Future's 100 Predictions for 2011-2012 – Part 2 – Big Conversations

We had an excellent response to our first set of predictions of inevitable surprises which can be found [here](#). In this issue we are exploring topics that we think could or should become a major focus of public discussion and debate between now and the end of 2012. As always, we welcome your feedback.

Social

1. **Education becomes a new battleground** Across the developed world in particular concerns will continue rising over the standards of state education systems and the risk of falling behind emerging economies where the value of education is held in high regard. Challenges will become ever-louder on the content, appropriateness and teaching methods in use. Pressure will mount to rethink both the underlying philosophy and physical delivery of education in many countries. Demands will increase for a greater emphasis on applying new insights from research on learning, integrating technology and blending live and virtual classroom components. The focus will also shift to finding new models for running the system. For example, the Khan Academy is a not-for-profit educational organization created and operated by Salman Khan. With the stated mission "of providing a high quality education to anyone, anywhere", the Academy supplies a free online collection of more than 1,600 videos on mathematics, science, history, and economics.

2. **Social, mobile and augmented** Social activity will continue to be transformed by the mobile web which is currently experiencing an unprecedented growth in use. By 2012, it is predicted that global smartphone shipments will be greater than notebook and PC sales combined and surpass the billion level by 2015.[i] Rising smartphone penetration coupled with the rise of social apps and services will continue to transform social activity. For example, we expect to see a rise in mobile aggregator sites offering deep instant discounts for same day food and leisure experiences if enough people sign up in a fixed window of time. We also expect to see the rise of reverse auction sites where communities offer themselves up to see which provider will bid the most attractive experience offer for that evening.

3. **Rising tolerance of small business law breaking** Recent months have seen a growing number of cases from the UK and elsewhere where unscrupulous employers have exploited and mistreated both legal and illegal foreign workers. Examples have emerged of

foreigners being held as slaves or forced to work in illegal factories with poor safety standards – leading to explosions and loss of life. An increasingly self-absorbed public will express concern, but do little to demand change. Overstretched and under-resourced police forces and judicial systems will in practice continue to turn a blind eye to detecting these abuses.

4. *Aliens land in Hollywood* The focus for film makers will increasingly reflect the rising mood of anxiety across their viewing public. The filmgoer needs someone or something upon which to focus our anger. Having exhausted Arab terrorists and World War II reruns for the moment, Hollywood may focus instead on other worldly threats. We anticipate a rise in films about alien invasion (e.g. Battle Los Angeles) and impending doom (e.g. Melancholia).

Economic

5. *China 2.0* We expect China to accelerate its preparations for the possibility of a Republican President in the US and a potentially more fractious relationship in the years that follow. China will increasingly seek to fire warning shots and make clear that it is in no mood to be bullied. The issue of the global reserve currency could be a key battleground.

Some say the process has already started. On August 6th, following the S&P's downgrading of the US credit rating from AAA to AA+, Xinhua the official Chinese news agency launched a scathing attack on US economic governance^[ii]. Xinhua argued that "The days when the debt-ridden Uncle Sam could leisurely squander unlimited overseas borrowing appeared to be numbered.... many outside the United States believe the credit rating cut is an overdue bill that America has to pay for its own debt addition and the short-sighted political wrangling in Washington".

Xinhua went on to say "...China, the largest creditor of the world's sole superpower, has every right now to demand the United States to address its structural debt problems and ensure the safety of China's dollar assets. To cure its addiction to debts, the United States has to re-establish the common sense principle that one should live within its means... It should also stop its old practice of letting its domestic electoral politics take the global economy hostage and rely on the deep pockets of major surplus countries to make up for its perennial deficits... International supervision over the issue of U.S. dollars should be introduced and a new, stable and secured global reserve currency may also be an option to avert a catastrophe caused by any single country".

6. *US job creation - a fine word burger topped with inaction sauce?* In June 2011 McKinsey estimated^[iii] that to replace the 7 million jobs lost in the US during the 2008–09 recession would take until 2016. A key problem is that whilst joblessness remains high and new Americans continue entering the labour force, there are millions of open positions for which there are too few qualified workers. A radical rethink is required to deliver a major programme of rapid re-skilling of those currently out of work and encourage the adoption of accelerated learning techniques to improve the prospects of those coming out of the education system. Whilst we expect the introduction of new training schemes and the idea of school reform to be broached, the political debate may hinder any serious progress in the short term.

7. *CIVETS on the prowl* First we had the BRIC grouping of Brazil, Russia, India and

China, to which South Africa has recently been added. Then came the E7^[iv] and N11^[v] – so which is the next country grouping that global businesses will focus on in their search for growth? We expect increasing attention to be paid to the CIVETS countries – Colombia, Indonesia, Vietnam, Egypt, Turkey and South Africa. The EIU^[vi] is predicting year on year growth for the CIVETS of 4.5% per annum from 2010 through 2030. This compares to 4.8% for the much more populous BRIC economies and only 1.8% for the G7. Issues around civil rights, stability and environmental degradation should figure prominently in country due diligence – but may be set aside by many in the quest for growth opportunities.

8. *Lost in transition* In the midst of the current financial turmoil and in the face of government debt reduction programmes, the ranks of unemployed and disaffected youth will rise across Europe. A lost generation of increasingly male unemployed youths is developing with stale skill sets and limited opportunities - exacerbating already simmering social tensions. Currently one in five people aged between 16 and 24 are unemployed in the UK. The figures in parts of Europe are much worse; with 44.3 percent of young people unemployed in Spain, 36 percent in Greece, 27.8 percent in Portugal, and 31.5 percent in Ireland.^[vii] An ageing population means the influence of this group is diminishing at the ballot box and despite much public hand-wringing by politicians, few large scale improvement measures are being implemented. As with the US, a radical and innovative overhaul of education, training and apprenticeship schemes is required to alter their prospects and give young people a stake in the future.

Technology

9. *Internet address revolution* The opening up of domain naming will create opportunities and confusion. In June 2011 the Internet Corporation for Assigned Names and Numbers (ICANN) approved a new array of top-level internet domain names. From January 2012 websites can apply to move beyond the traditional .org and .com addresses to use more specific domains such as .human rights, .app, and the designated pornography domain of .xxx. This creates new branding opportunities for those who want invest in a new dot domain name. There will inevitably be costly battles over the most sought after names. However, whilst opening up branding opportunities, the move could create confusion amongst users faced with a myriad of new domain addresses - ultimately they will simply turn to search engines to find the desired site.

10. *Augmented worlds – choose your reality* 2012 will be the year of the augmented reality (AR) app. As businesses seek to differentiate themselves in turbulent times, these relatively low cost developments will be seen as a quick and distinctive way of capturing customer attention. AR solutions enable us to overlay data on the world around us. For example, the Copenhagen Airport app allows you to navigate around the airport, highlights where to find retail, leisure and dining options, provides user reviews and offers prompts related to your flight. Marketeers will embrace AR in their quest to deepen and strengthen the relationship between product and service brands and consumers.

Commercial

11. *Discount Discount Discount* Demand aggregator sites will drive opportunity and innovation in the most unexpected places. Recently National Louis University in Chicago sold all the places on an entire course via Groupon – offering students a 57 percent discount on the normal course fee of \$2,232. We expect to see a growing range of services from airline seats to medical treatments and even counselling to be sold in this manner over the

next year.

12. *We fly Wi-Fi* We anticipate a significant expansion of inflight WiFi offerings by the end of 2012. One of the biggest debates in the airline industry is how to deliver and charge for in-flight Wi-Fi services. Several airlines such as Lufthansa, Virgin America, AirTran and Delta are already offering in-flight Wi-Fi on a number of their routes. A combination of technological advancement, falling market prices and the pull of consumer expectations are driving the change. The process of industry wide adoption of comprehensive in-flight Wi-Fi will gather pace in all but the thriftiest budget carriers.

13. *The customer as service agent* An increasing number of firms will shift portions of their customer service to the social media. Many will also seek to engage their most active customers as unpaid service agents – providing advice and resolutions to other customers' queries. The opportunities are immense – for example mobile phone operators could dramatically reduce inbound calls from new phone customers by allowing customers to upload their own 30 second videos on how you use key features on a phone. The most forward-thinking brands will recognise the value of acknowledging and rewarding these unpaid agents – be it through account credits or offering access to new model in advance of the market.

14. *Cloud cover* The pressure to control operating costs, reduce asset inventories, increase flexibility and access new functionality faster will all accelerate the take up of cloud computing by businesses around the globe in the coming 12-18 months. For those on a rapid globalization path, the cloud based or Software as a Service (SaaS) model also offers the promise of global access to common systems. The pace of adoption will accelerate despite concerns over security and data theft (see our recent article on the [Future of Secure Data in the Cloud](#)).

Environmental

15. *Waste not want not* The debate will grow over the issue of where the world sends its waste and who pays for the long term clean up costs. The fast-developing countries will increasingly seek to adopt environmental regulations more typically associated with medium-high wealth economies. Their resulting reluctance to accept foreign waste could lead to two parallel developments. Firstly poorer economies may step in to accept the waste that no one else wants – at a price. Secondly, the need for more sustainable solutions could lead to renewed interest and investment in waste to energy conversion technologies.

16. *Iran and the Middle East – the nuclear option* Iran will expand and accelerate its nuclear energy programme. Iran's nuclear program is currently attracting less media coverage, possibly due to ongoing economic weakness and domestic politics in many western nations. Other Middle Eastern countries are also pursuing the nuclear option. Gulf States, led by Saudi Arabia are looking to invest heavily in the technology to 2030, ostensibly to diversify their energy intense economies away from hydrocarbons and to prepare for a coming era of high oil and gas prices. Iranian nuclear success and any escalation of Saudi-Iran tensions could lead the west to recast its lens on Iran – numerous possible follow-on scenarios present themselves.

Political

17. *New global leadership, old challenges, limited options* Over the next 12-18 months there could be a sea change in global political leadership. Elections are on the horizon in the US, Russia, France, Italy and Spain and China (see below) will see a leadership change. However, the scale of challenges faced by the first five and the weight of expectation on the latter will mean the new leaders have little room for manoeuvre to introduce new policy

measures.

The economy will clearly play a central role in determining the next US President (see below). Spain's Jose Luis Rodríguez Zapatero will not seek a third term. Continuing controversy surrounding Silvio Berlusconi in Italy will pressure him to step down after two decades in power. In France, a beleaguered President Sarkozy will probably hold onto his position. In Russia, Putin seems likely to reclaim the presidency, whilst in the UK, there's an outside chance that a double dip recession and further social unrest could force the current conservative-liberal coalition to disband.

18. *China's first president of the world?* For at least the last century, the world has grown accustomed to the US President accepting the de facto mantle of leader of the (free) world. A Republican in the White House could see the US turn inward and focus its attention on a range of domestic challenges. China could increasingly be nudged, pulled and pushed into playing more of a global leadership role – representing in particular the views and needs of the developing world majority on the planet. As China faces transition to a new leadership next year, the responsibility would lie with current Vice President Xi Jinping who is due to take over from Hu Jintao as President of China and General Secretary of the Chinese Communist Party in 2013. Xi's stance is as yet unclear on many issues. Whilst he has made conciliatory moves towards the West, he has also been uncompromising on the issue of a separatist Tibet and is unlikely to countenance a populist Tibetan uprising or support for it abroad.

19. *Korea – love don't live here any more* South Korea will adopt an increasingly assertive posture in the face of continued hostility from its volatile northern neighbour. March's sinking of a South Korean Navy Vessel and subsequent artillery exchanges have stoked the fire on the peninsula whilst rising world food prices threaten to worsen an already dire situation among the North's poor. We have also been witness to the grooming of Kim Jong-Il's Son, Kim Jong-Un to become premier, introducing another factor into a volatile mix. The South is keen to protect the rapid advances in economic and living standards it has achieved and will increasingly match any aggression from the North but is unlikely to take pre-emptive steps.

20. *The US Presidential Election – Two Scenarios* Given the two most probable outcomes (barring the emergence of a credible independent candidate), we have focused on outlining possible scenarios for what might happen next.

Democrat Victory – A successive victory for the Democrats should reinvigorate the Obama presidency. His supporters would encourage the regime to have the confidence to pursue the more radical agenda on which he was originally elected and continue with the tentative social reforms of the previous four years. However the continuing economic crisis at home and abroad will remain Obama's principal priority. Without reform of the US political process, this suggests four more years of tortured economic wrangling with the Republicans and resulting compromises that push any proposed economic policy to the right.

Republican Victory – Whichever Republican candidate succeeds, an early and populist course of action will be to dismantle or neuter key social legislation from the Obama regime, most notably healthcare reform. In the face of continued economic turmoil, the Republicans, at the behest of the Tea Party, will most likely seek drastic cuts in the regulatory powers of the federal government, reduce taxes across the board, and ease environmental restrictions.

7. Presentations at Imex Las Vegas

I am going to be delivering the following presentations sharing different aspects of the findings of the Convention 2020 at [Imex Las Vegas 11th-13th 2011](#) – I hope to see some of you there:

- Monday 10th October 17.00 – 17.20: Association Day - Event Innovation - The Latest Examples from the Convention 2020 Study
- Tuesday 11th October 10:30 – 11:15: Learning Zone - Convention 2020 – Global Business Trends and the Implications for the Meetings Industry
- Tuesday 11th October 11:30 – 12.15: Learning Zone - Campfire - Convention 2020 – Global Business Trends and the Implications for the Meetings Industry
- Tuesday 11th October 12:30 – 13.15: Learning Zone - Convention 2020 Session – Meeting Innovation and the Technology Timeline
- Tuesday 11th October 16.30 – 17.30: - CEO Forum - Convention 2020 - the Future of Association and Corporate Meetings - Launch of Findings - Titian 2306, The Venetian/Palazzo Congress Centre
- Wednesday 12th October 10.30 – 11.15: Learning Zone - Convention 2020 - Future Strategies for Venues
- Wednesday 12th October 11.30 – 12.15: Learning Zone - Campfire - Convention 2020 - Future Strategies for Venues
- Wednesday 12th October 12.30 – 13.15: Learning Zone - Convention 2020 - the Future of Association and Corporate Meetings
- Wednesday 12th October 14.00 – 14.45: Learning Zone - Campfire - Convention 2020 - the Future of Association and Corporate Meetings
- Wednesday 12th October 16.15 – 17.00: Open Session / Future Leaders Forum Convention 2020 – Emerging Industry Priorities, Strategies and Business Models - Titian 2301A, The Venetian/Palazzo Congress Centre
- Thursday 13th October 10.30 – 11.15: Learning Zone - Convention 2020 - Future Strategies for Convention Bureaus - The Engines of Growth Seminar
- Thursday 13th October 11.30 – 12.15: Campfire - Convention 2020 - Future Strategies for Convention Bureaus - Engines of Growth

Rohit on the Road

In the coming months I'll be delivering client speeches, workshops and stakeholder briefings on the future of HR, digital narcotics, virtual travel, the world in 2015-2030, the future of communications, business complexity, strategic innovation, city development, the future of meetings, the future of aviation and airports, tourism futures, developing entrepreneurship, and the future for sectors such as media, retail, IT, insurance, legal services and infrastructure.

Please let me know, if you'd like to arrange a meeting, presentation or workshop on one of my forthcoming trips. I'll be speaking in London, Barcelona, Bodrum, Bristol, Copenhagen, Las Vegas, Leipzig and Vilnius.

About Fast Future

Fast Future is a research and consulting firm that works with clients around the world to help them understand, anticipate and respond to the trends, forces and ideas that could shape the competitive landscape over the next 5-20 years. We draw on a range of proven foresight,

strategy and creative processes to help clients develop deep insight into a changing world. These insights are used to help clients define innovative strategies and practical actions to implement them.

[i] <http://mobiltron.blogspot.com/2011/06/idc-says-global-smartphone-shipments.html> n

[ii] After historic downgrade, U.S. must address its chronic debt problems, Xinhua News Agency http://news.xinhuanet.com/english2010/indepth/2011-08/06/c_131032986_2.htm

[iii] https://www.mckinseyquarterly.com/The_growing_US_jobs_challenge_2816

[iv] Brazil, Russia, India and China, plus Mexico, Indonesia and Turkey.

[v] Bangladesh, Egypt, Iran, Indonesia, Mexico, Nigeria, Pakistan, Philippines, South Korea, Turkey and Vietnam.

[vi] Epoch Hothouse Foresight PDF 2011

[vii] <http://www.telegraph.co.uk/finance/jobs/8564500/Interactive-graphic-Youth-unemployment-in-Europe.html>