

Driving Future Growth



ERA Convention 2012 – Oslo – May 16th 2012

Rohit Talwar CEO - Fast Future Research

www.fastfuture.com rohit@fastfuture.com

Twitter @fastfuture



‘Future Proofed’ Organisations Work on 3 Horizons in Parallel



1-12 Months

**Operational
Excellence**



1-3 Years

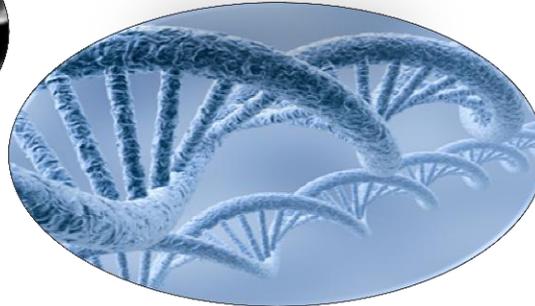
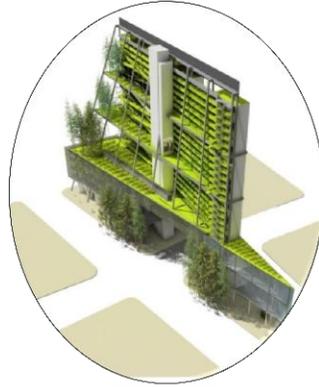
**Drive for
Growth**



4-10+ Years

**Creating the
Future**

The World in 2020



Choosing a Future



**Markets
and
Models**

**Capability
and
Technology**

**Mindset and
Behaviours**

Future Proofing the Business



Markets



Mastery



Muscle



Magic



Message



Models



Management



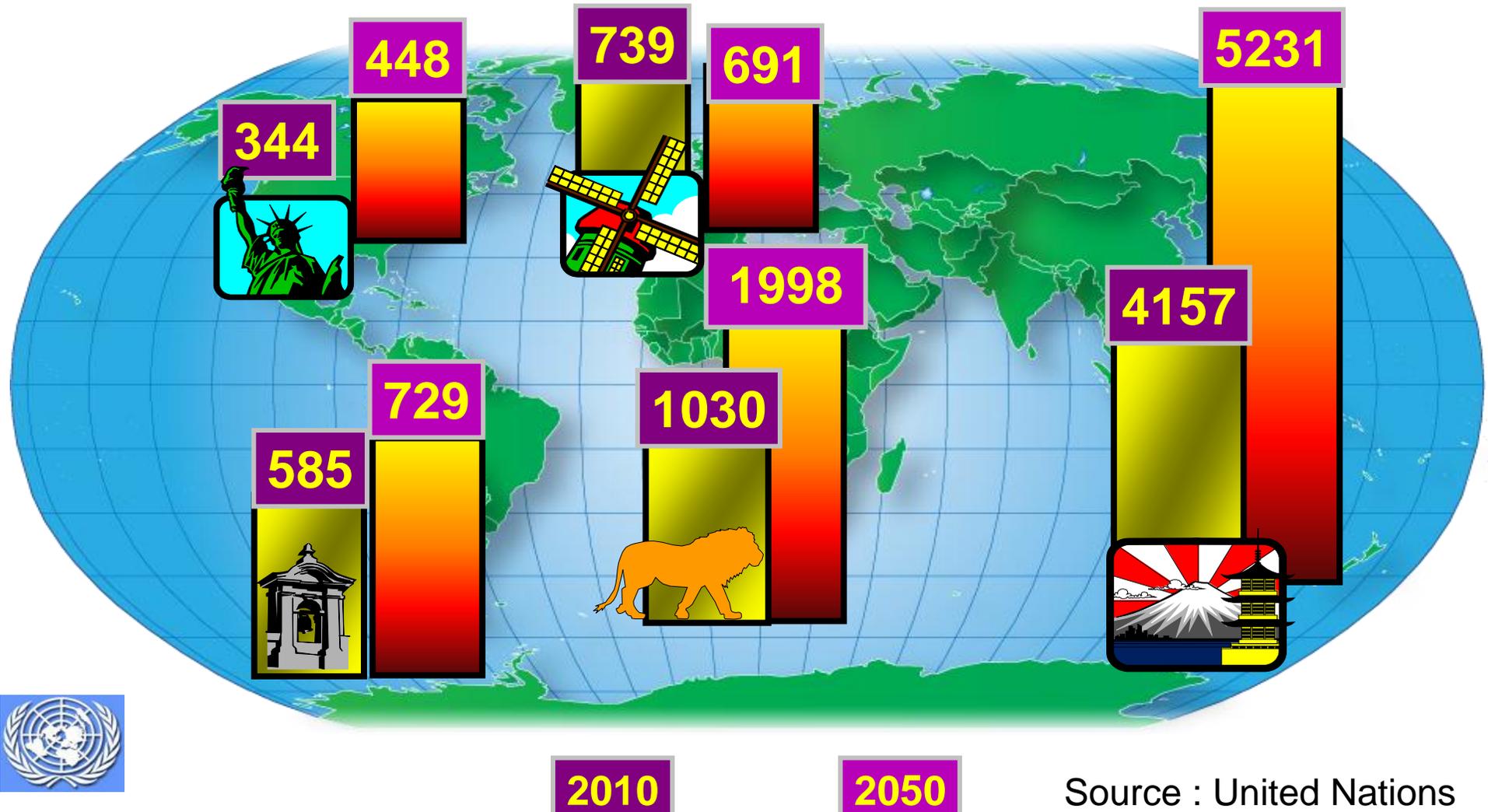
Mindset

Markets



Markets – Growth Poles

2 billion more people in 40 years – Demographics is Driving Economics



Source : United Nations

Markets - Life Redefined

Lifespans are Increasing

Under 50's have 90% chance of living to 100.

Aubrey de Grey suggests we could live to 500 or 1000

What are the health, housing, consumption and resource implications?

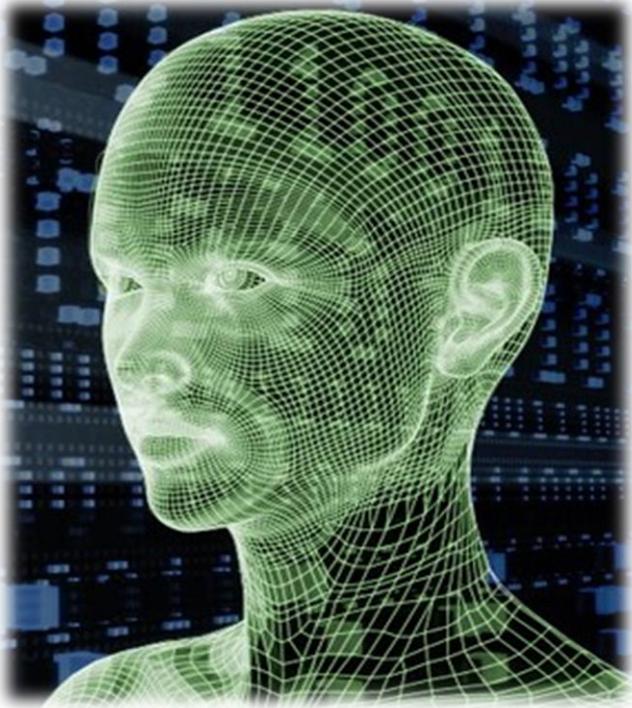
What kind of opportunities will be created?



Adjacent Markets – Build on your Core Strengths

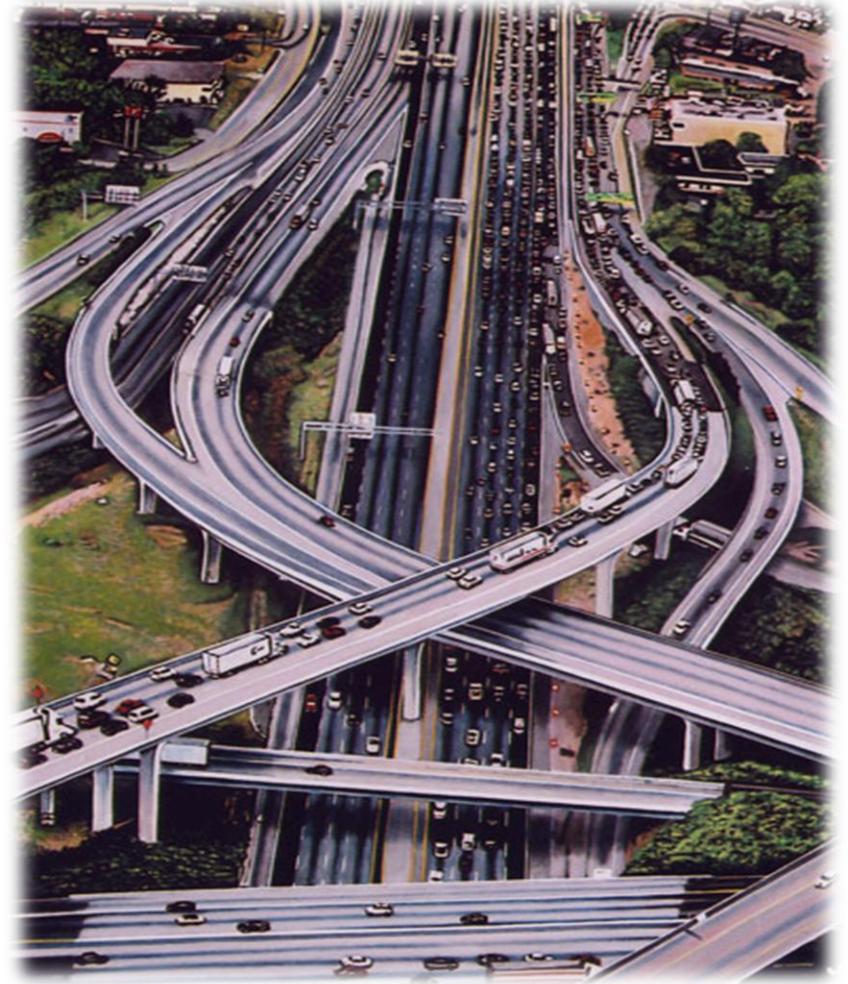


Markets – Focus on Growth Industries



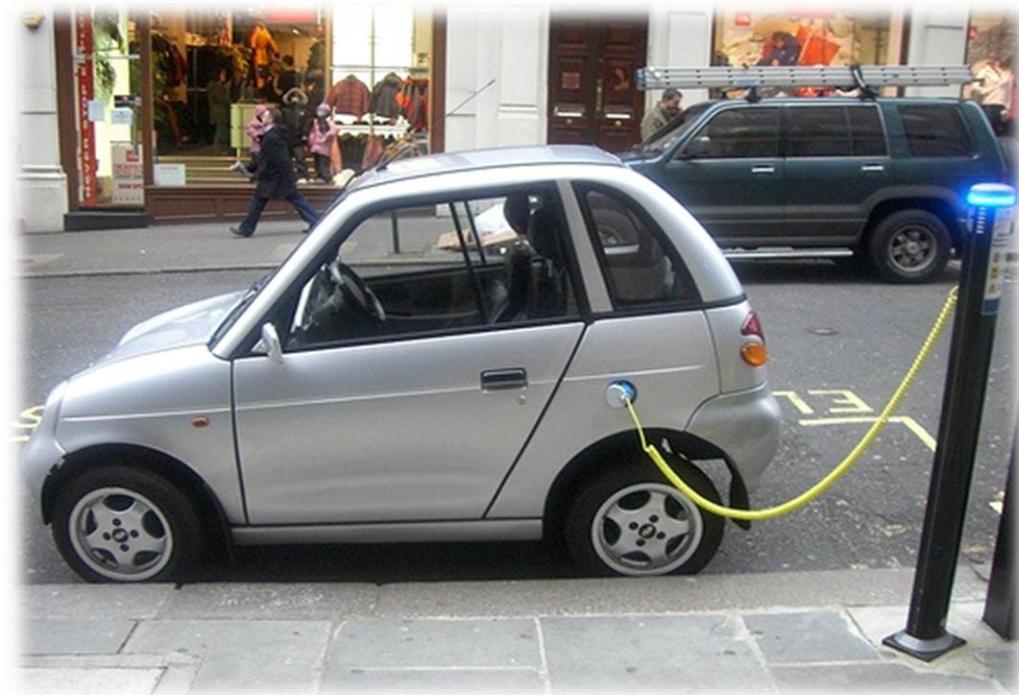
Rising Infrastructure Spending

- **CIBC projects up to \$35 trillion in public works by 2030 (1)**
- **Annual spend:**
 - **North America \$180Bn**
 - **Europe \$205Bn**
 - **Asia \$400Bn**
 - **Africa \$10Bn**



Green Buildings - \$600Bn by 2015

Green Transport Revolution



Mastery



in the Middle East - A Vision to 2020

World economy to grow 80% by 2020.

Global POPULATION TO REACH 8Bn

... of the ... billion ...
Qatar ... project by 2015

... plans to ...
... number ...
... tourists by 2014.



QATAR AIRWAYS BEACHFRONT PROJECT COMPLETE



OPENING OF BAHRAIN-QATAR EXPRESS LINK.

Abu Dhabi, The Emirates Pearl Island Project: US \$27Bn man made island. 29 hotels, 1 is 7*, completes 2018



Virtual Travel



... Airline' could ...
... 10% of Longhaul



Doha International Airport Completed

Egypt's \$16Bn Garmaha Bay development to complete by 2017

200 SPA LOCATIONS IN DUBAI

ABU DHABI TARGETS 3M VISITORS BY 2015

NUMBER OF TOURISTS EXPECTED TO REACH 150 MILLION BY 2020

By 2027 Middle East Airlines will buy 870 aircraft.

Dubai International Airport projected to be handling up to 100M passengers per year by 2025

OMAN TARGETS OMANISATION RATE (NO. OF LOCALS EMPLOYED) OF 50% BY 2020 IN TOURISM SECTOR

AIRCRAFT 50% MORE FUEL EFFICIENT



Hypersonic Travel by 2020



By 2050 humans will need at least two planets' worth of natural resources to live as they do now.

Dubai forecast to double number of tourists by 2022

GLOBAL TOURIST ARRIVALS TO REACH OVER 1.56BN BY 2020.

Saudi targets 2M non-Hajj and Umrah visitors by 2020

100M CHINESE OUTBOUND TOURISTS

World tourism market could TRIPLE

Monaco



... Airway ...
... taking ...
... of 6 ...
... Airbus ...
... in 2012.

OPENING OF DUBAI JEBEL ALI AS WORLD'S LARGEST AIRPORT - 70M PASSENGERS BY 2016, EXPECTED TO BE OPERATIONAL 2017 AND ULTIMATELY CAPABLE OF HANDLING 120M PASSENGERS



Digital concierges could manage our entire travel experience by 2015

RAS-AL-KHAIMAH 2.7BN WATERFRONT DEVELOPMENT COMPLETE

AIRBUS PREDICTS ME PASSENGER TRAFFIC TO GROW 7.1% ANNUALLY TO 2015 AND THEN 5.2% UNTIL 2025.



Larger than Monaco, DubaiLand completed in 2020. Opening in 2010 it will employ 300,000 people in the various joylands, servicing 15 million visitors.



ROBOTIC HOTEL STAFF WILL BE COMMON

ME PASSENGER FLEET COULD RISE TO 1195 AIRCRAFT BY 2025.

IRAN TARGETS 25M VISITORS

MULTILINGUAL CONVERSATIONAL INTERFACES COULD REPLACE KEYBOARDS.

WATER AVAILABILITY IN MIDDLE EAST AND NORTH AFRICA TO DROP BY HALF BY 2050.

FLOODING RESULTING FROM CLIMATE CHANGE COULD DISPLACE 200M.

Oman's 2M tourist capacity \$15Bn Blue City development to be completed by 2026.

2015

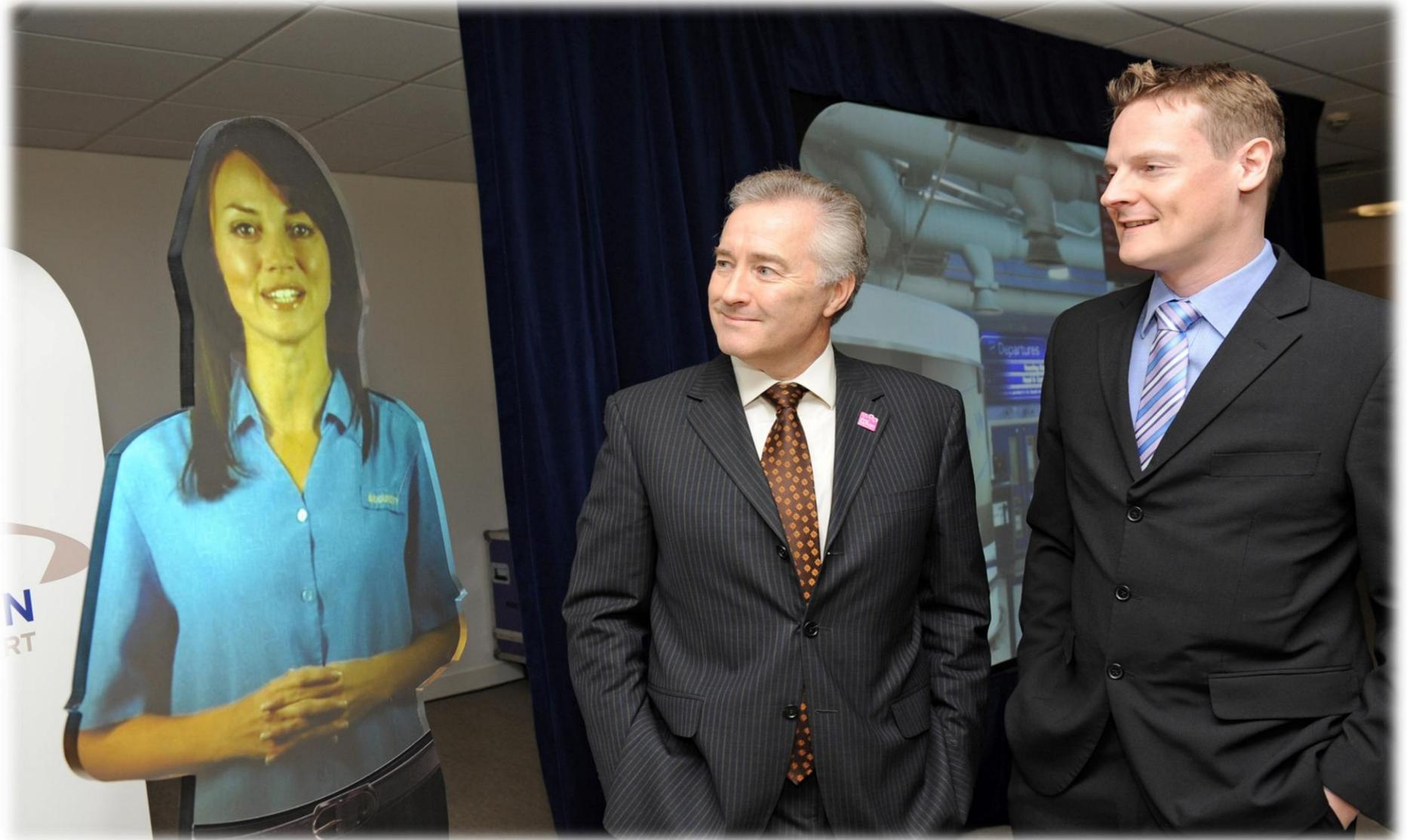
2020



Arab Travel Solutions

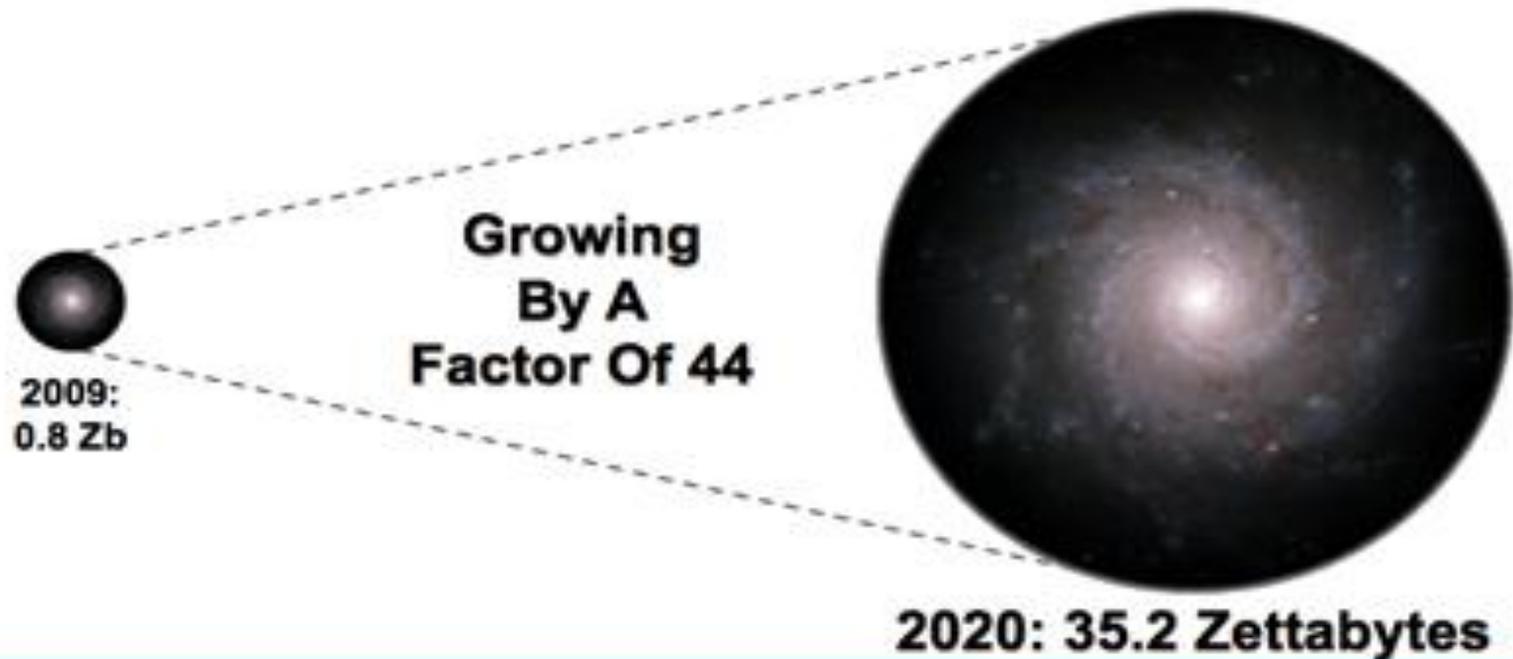


Mastery - Service is the 'Killer App'



Mastery – Data and Technology

The Digital Universe 2009-2020



Source: IDC Digital Universe Study, sponsored by EMC, May 2010

EMC
Data Protection Experts

© Copyright 2010 EMC Corporation. All rights reserved.

New Analytics and a New Knowledge Infrastructure

Convergence and Personalisation

Telephony

- Voice
- Messaging
- SIM card
- Phonebook
- Ring Tones
- Security

Data/ Enterprise

- 100Mbps
- Email
- IMS
- Browsing
- VPN
- PIM
- Ecommerce
- Payments

Software

- Protocols
- Middleware
- Applications
- User Interface
- Minimize fragmentation

Connectivity

- Cellular
- Up to 14 bands
- WLAN/BT
- GPS
- NFC
- FM

Multimedia

- Camera 8-16M
- Camcorder
- 24M Color Display
- Memory (160GB)
- Multiformat A/V
- HD Video/TV out
- Games
- (50-100M Tps)
- DRM



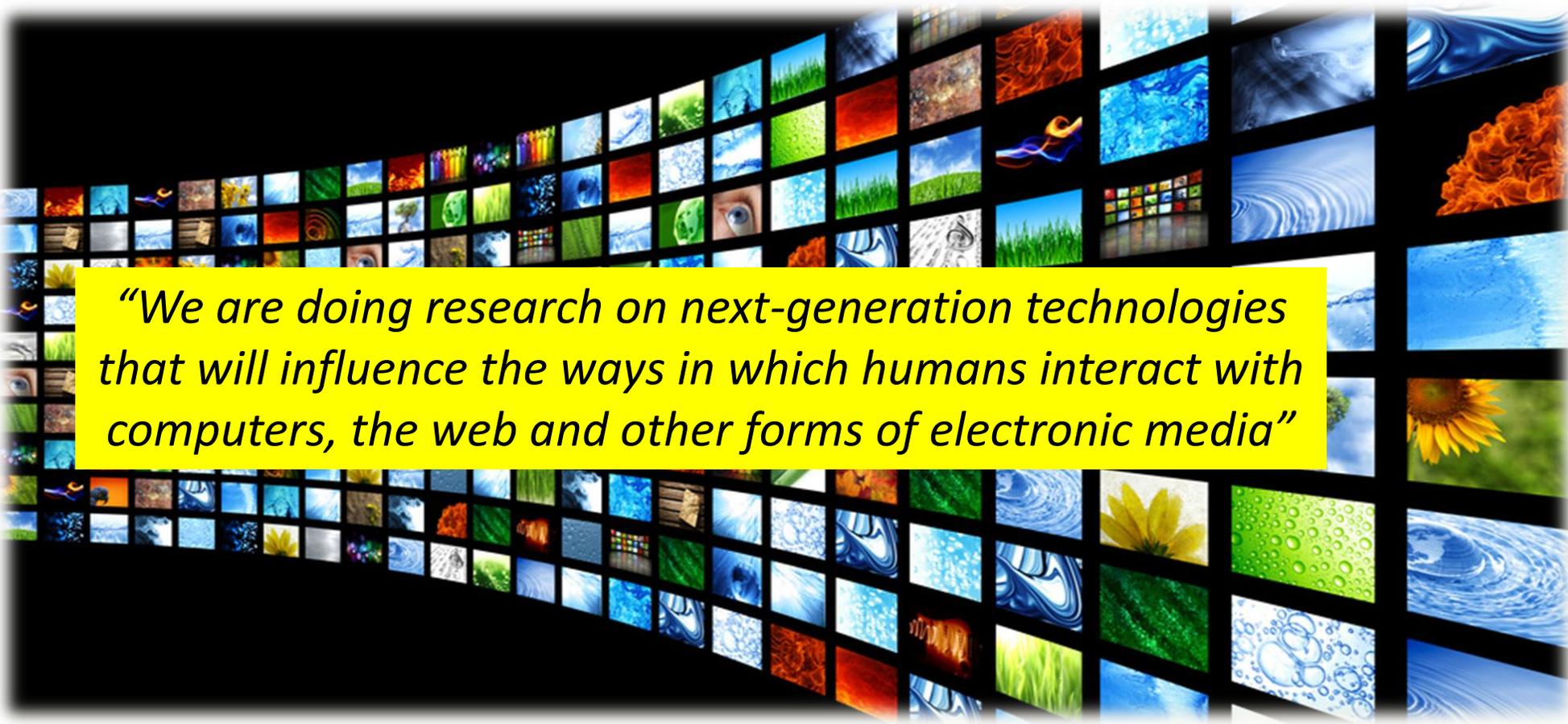
Next Generation Interfaces



Augmented Reality



Mastery – Rapid Innovation e.g. Naspers' New Media Lab ***(“Fail fast and cheaply” – Koos Bekker, CEO)***



“We are doing research on next-generation technologies that will influence the ways in which humans interact with computers, the web and other forms of electronic media”

Research at ‘cutting edge of technological media innovation’ e.g. human-computer interaction, augmented reality, online gaming, internet television and semantic text processing

Mastery - New Construction Practices e.g. Neapo Pre-Fab Apartments



Muscle



Muscle – Rapid Decision Making



Muscle – Speed of Execution e.g. Ultra-Quick Construction



Magic



Magic – Ideas that Delight

E.g. Virtual Grocery Shopping – Tesco South Korea



Magic - 3D Printing of Houses (Contour Crafting)



3D Printing of Houses



Message – Engaging the Customer e.g. Open Innovation



Models - Multiple Streams and Pre-emptive Solutions



Models – Access and ‘Usership’ vs. Ownership



Shell – From Asset Ownership to a Zero Fixed Cost Model



Person to Person Rental

I am an
Owner

zilok

I am a
Renter

1

I sign up for free

 Sign up

I look for an object to rent



1

2

I offer my goods for rent



I choose an object that interests me



2

3

I am contacted by the **renter** for each reservation and I receive his or her contact information.



I reserve the rental item by prepaying a retainer fee and get the contact information of the rental **owner**.



3

4

I meet the **renter** and give him the object



I meet the **owner** and receive the object

4

5

My object is returned and I collect my money



I return the object and pay the **owner**

5

6

I evaluate the **renter**

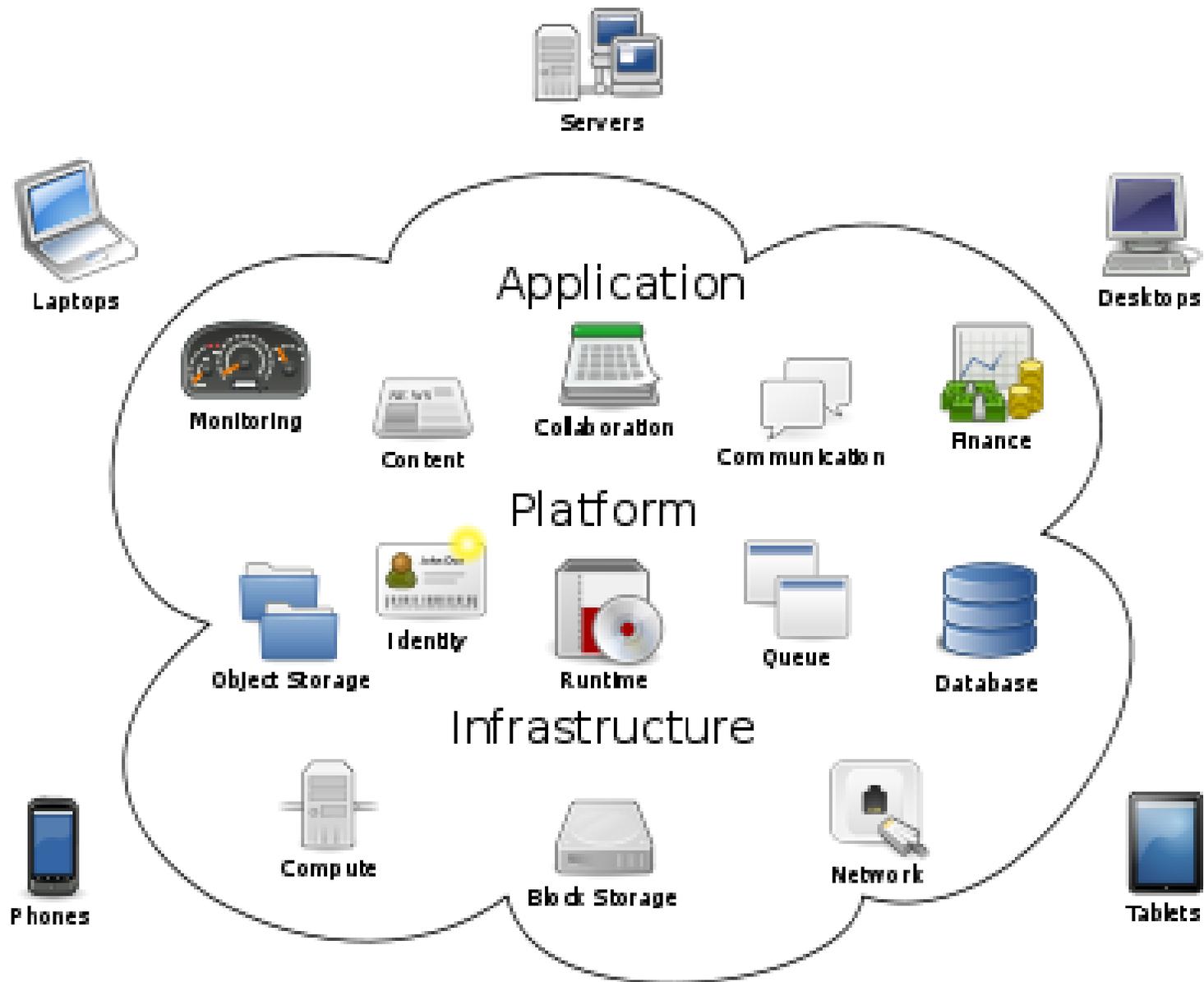


I evaluate the **owner** and the object



6



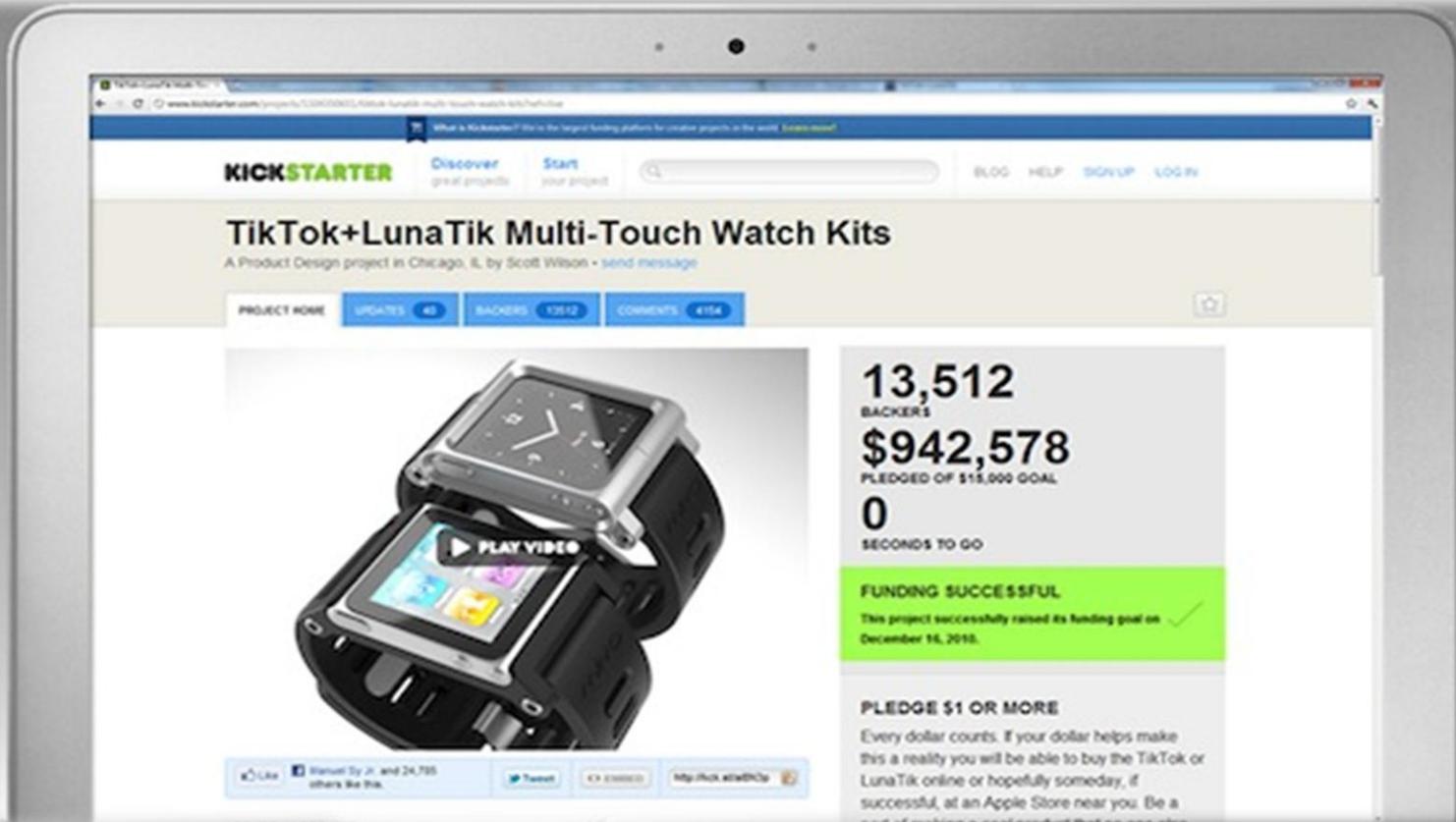


Cloud Computing

Usership e.g. Movie Digitisation - Digital Development



Kickstarter.com



Models - Continuous Innovation

E.g. Auctions

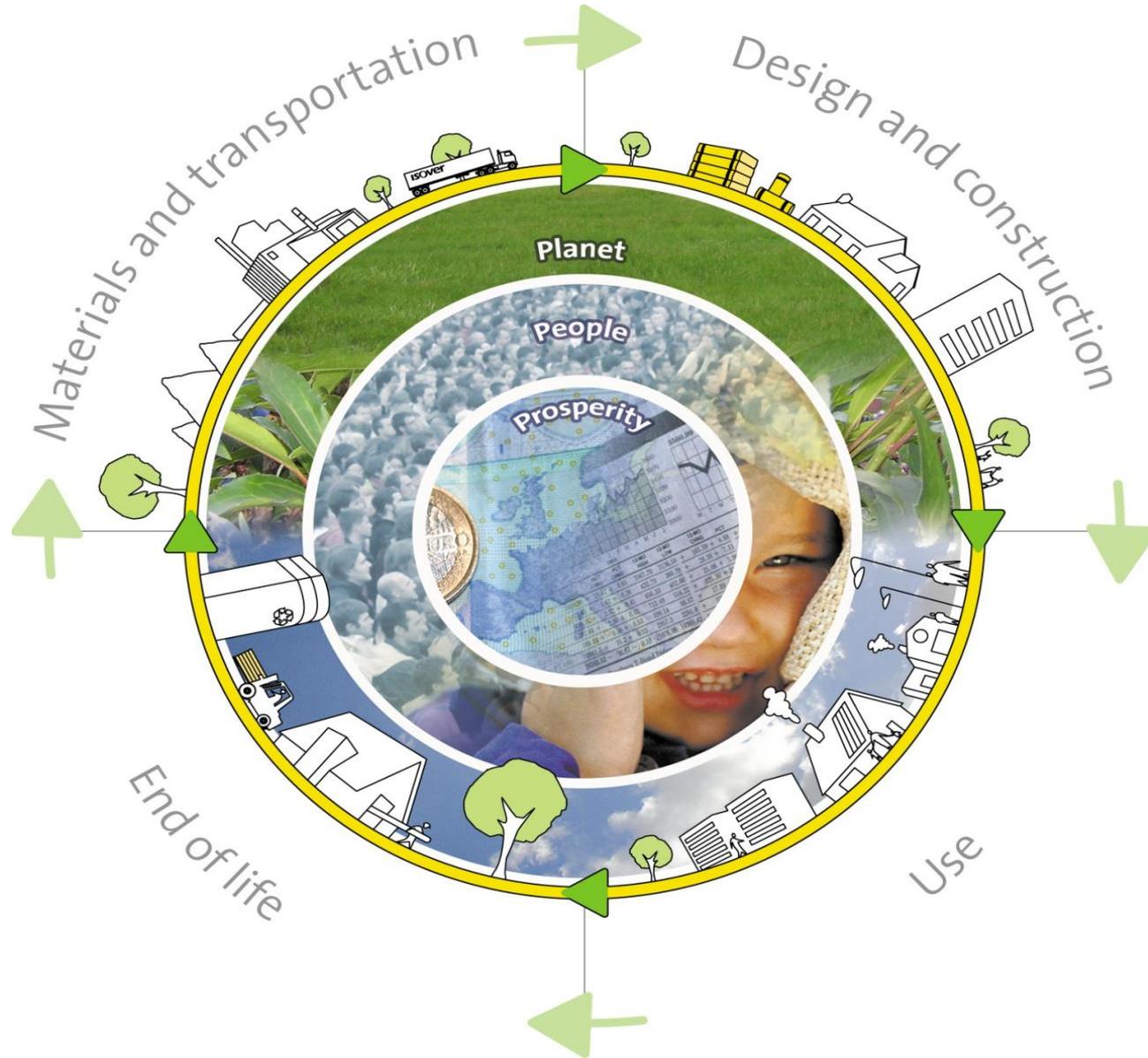
Sony Bravia 37" TV	Sony 15.5" 4GB Windows	£125 Cash
		
RRP: £630 Auction Time: 1 min	RRP: £614 Auction Time: 30 s	RRP: £125 Auction Time: 1 min
25 s	26 s	56 s
£20.59	£58.61	£0.54
Highest Bidder: zannisalvatore	Highest Bidder: weegie75	Highest Bidder: badassjay
• Bid via mobile (£1.50 per SMS), text MAD SOHY3 to 80160 .	• Bid via mobile (£1.50 per SMS), text MAD SOHY7 to 80160 .	• Bid via mobile (£1.50 per SMS), text MAD CH12S to 80160 .
BID NOW!	BID NOW!	BID NOW!

£3088

£8791.50

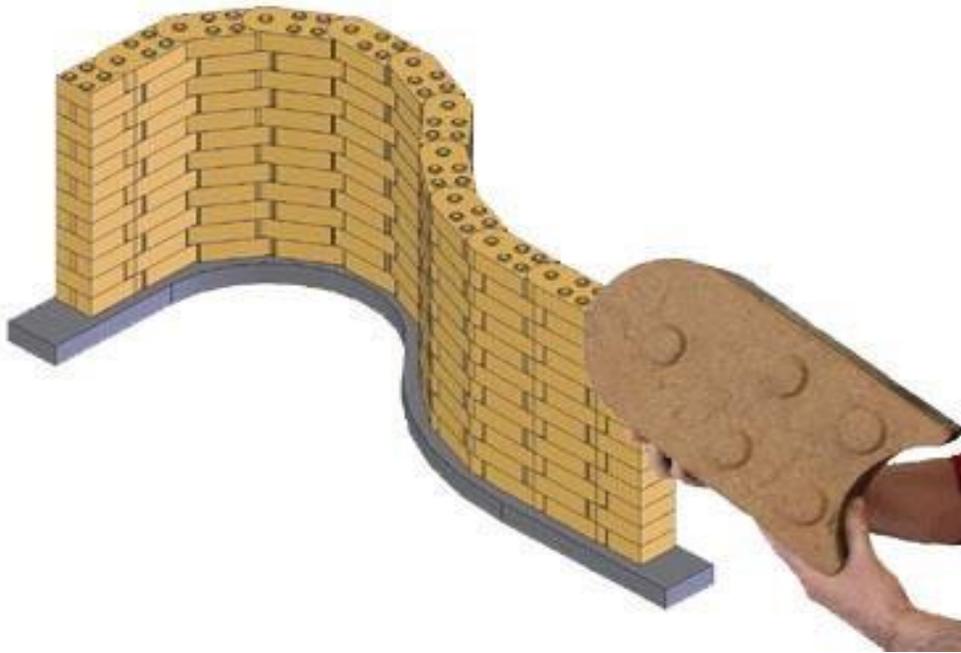
£81

Muscle - Sustainability



Muscle - Eco Materials for Construction

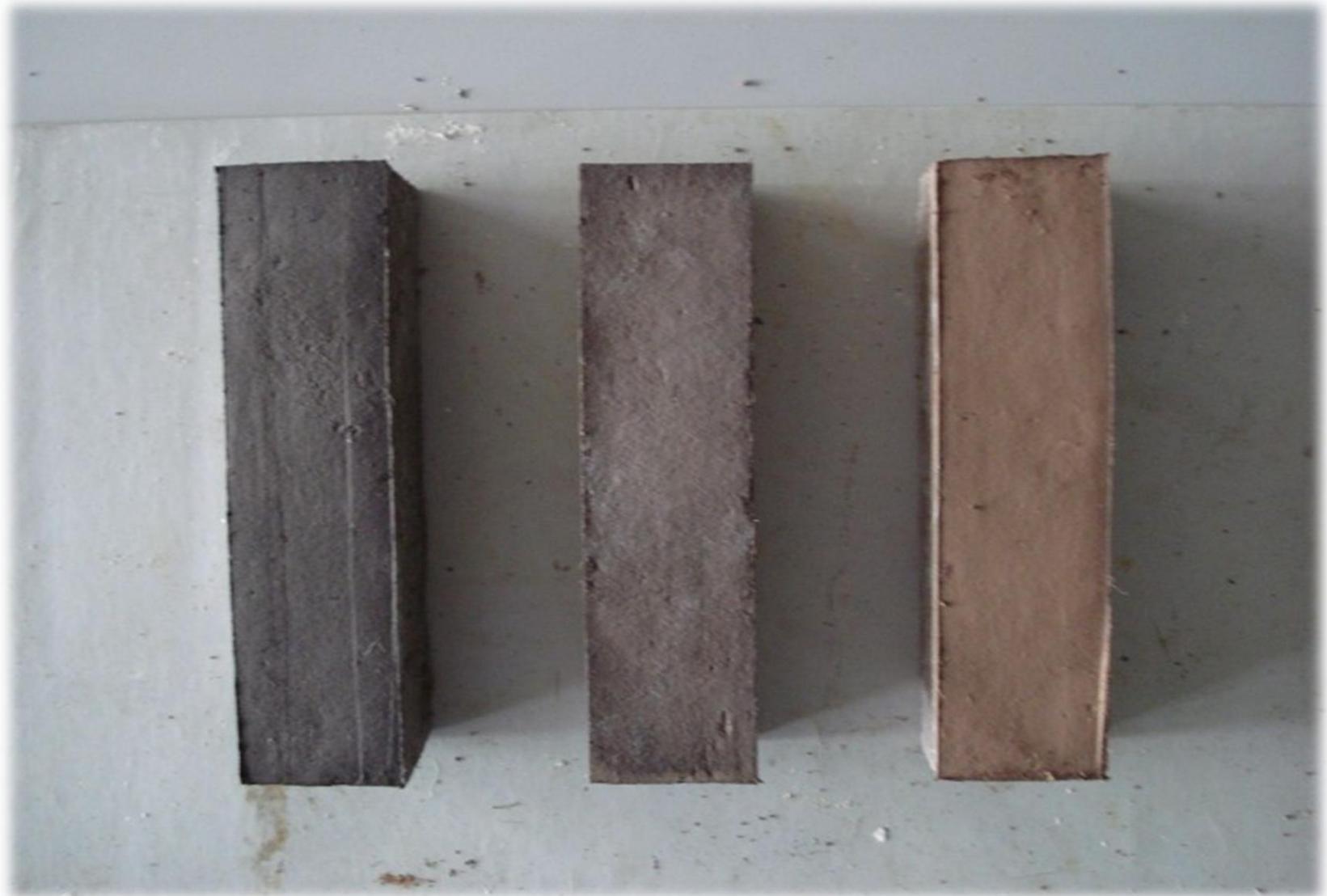
E.g. Meco Brics – 30 Sec construction



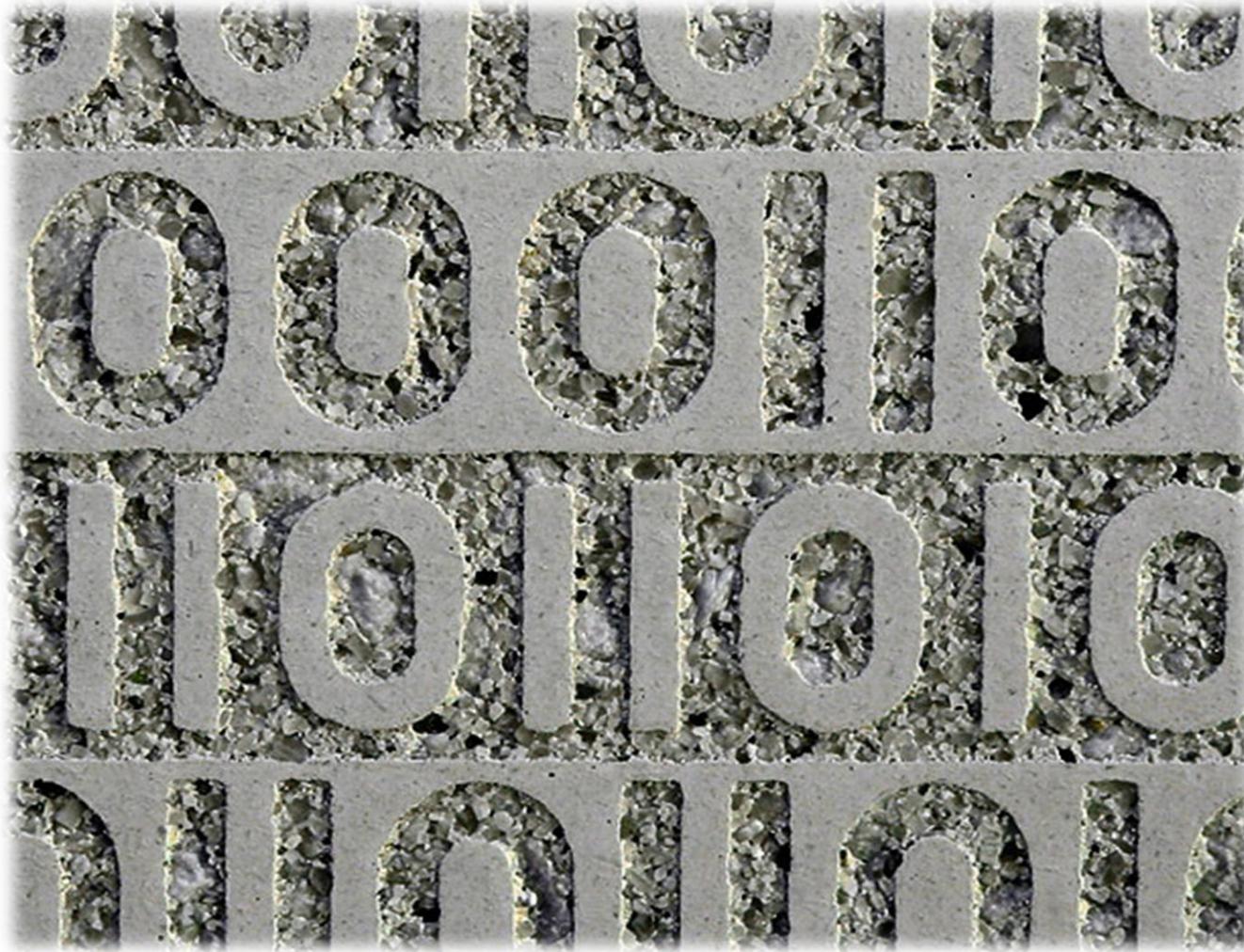
Utility Lessons from Nature



Wool and Seaweed Bricks



Self-Healing Concrete



Management



Management – Celebrate Successes



Management - Make Time and Space for Change



Management - Lead or Follow?



Performance Management - Maximising Employee Contribution

Supporting lifelong learning - continuous re-skilling - 61%

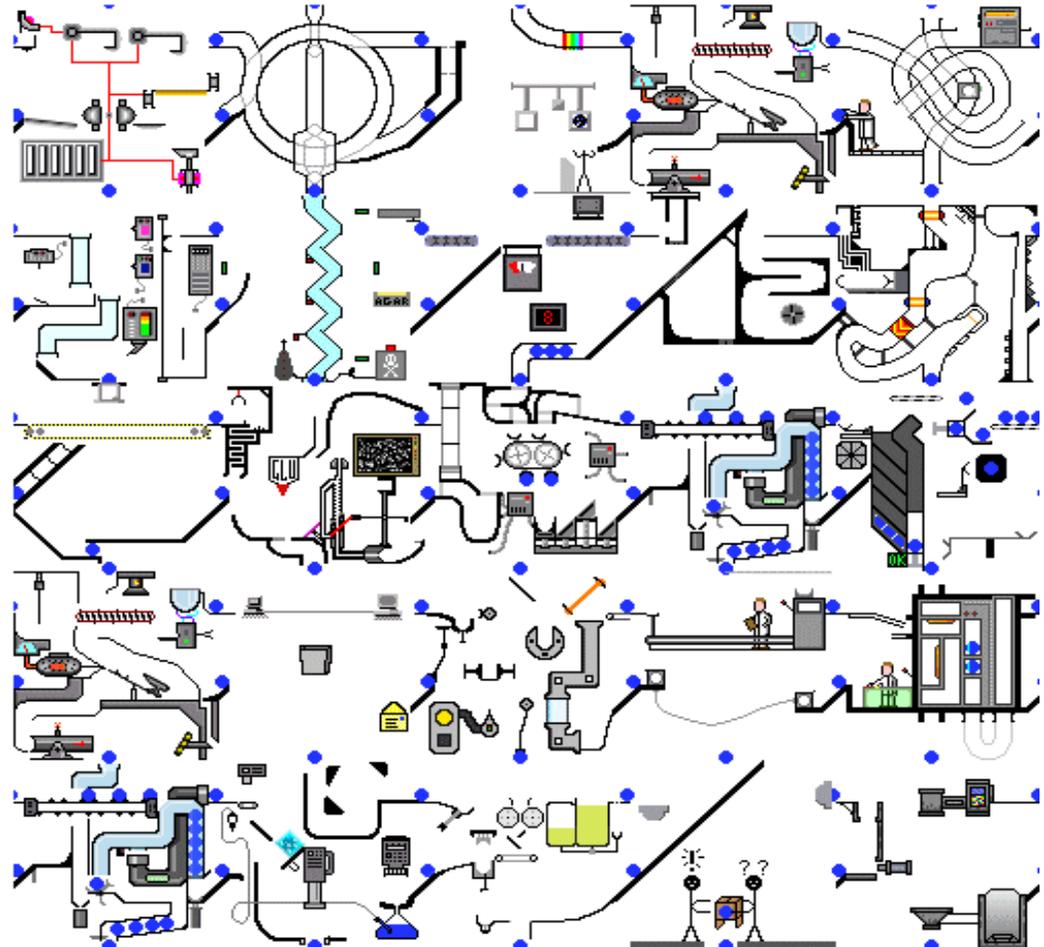
Implementing real-time learning / development solutions - 49%

Improving training / delivery effectiveness - 40%



Management - Tackling Complexity

- Customer Interface
- Process
- Organisation
- Information / Systems
- Regulatory
- Human



Mindset

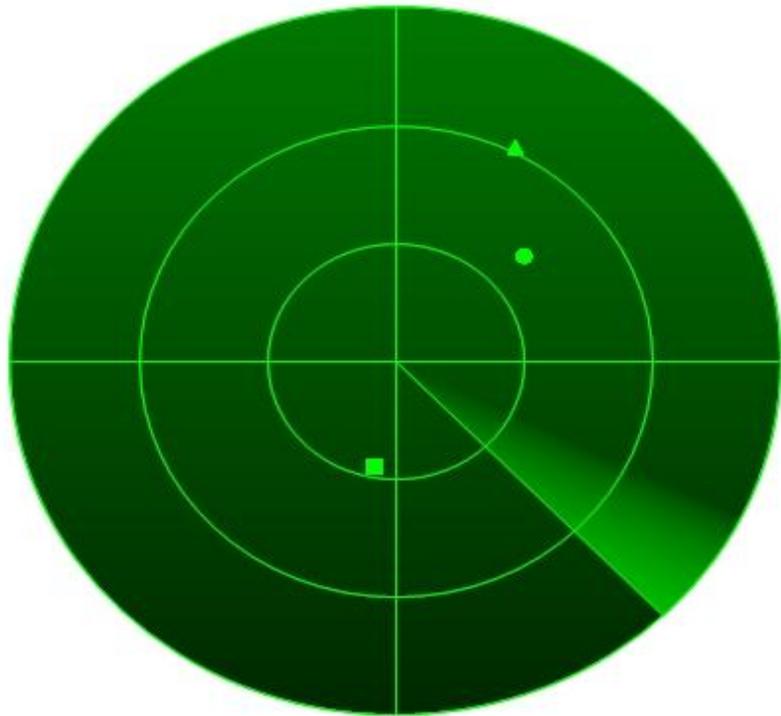


Mindset - 3 Horizon Thinking

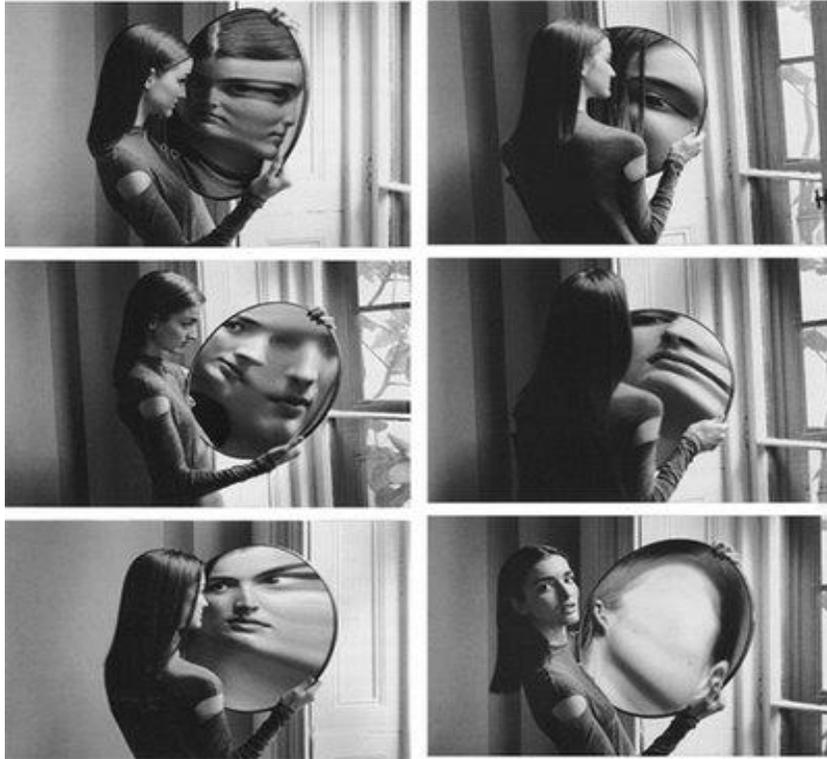
- 12 Months
- 1-3 Years
- 4-10 Years



Mindset – Broad Scans and Deep Dives



Mindset - Tolerant of Uncertainty



Encourage Experimentation

Mindset – Curious, Sticky and Magnetic



Future Proofing the Business



Markets



Mastery



Muscle



Magic



Message



Models



Management



Mindset

Conclusions

- New Turbulent Era
- Future is a Journey
- The Door is Open

