

Trend Analysis

A synthesis of the major information & insights drawn from a thorough reading of several business & lead books incorporated into the Leading From the Future presentation

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Table of Contents

Key Sources -----	4
#1 The High Quality, Global Marketplace -----	7
A. Quality Is an Entrance Requirement-----	7
B. Customer As King-----	7
C. Quality and Success Are Transitory-----	7
D. The Seamless World Economy -----	8
E. The Electronic Herd -----	8
F. Even "Mom and Pop" Can't Hide-----	8
G. China Is Coming-----	8
H. Doing Well by Doing Good -----	8
1. English As the Common Global Language -----	9
#2 Transformational Technologies -----	10
A. The Internet -----	10
B. e-Everything-----	10
C. Interactive Machines and Tools -----	11
D. On-Demand Interactive Communication-----	11
E. Miles Are Meaningless -----	11
F. If It Doesn't Require High Level Thinking, You're Vulnerable-----	11
G. Where Has All the Paper Gone? -----	11
H. e-Dependence-----	11
#3 The Adept, Empowered Employee in the Nimble Organization -----	12
A. Change Is the Only Constant -----	12
B. Mass Customization -----	12
C. Small Is Powerful -----	12
D. The Quick Get Richer-----	13
E. Competence as Capital, Knowledge as Power-----	13
F. The Rise of the Independent Contractor-----	13
G. The Twenty-four Hour Economy-----	13
H. The Pervasive "Value-added" Agenda -----	13
#4 The Virtual Workplace -----	14
A. The Anywhere, Anytime Workplace-----	14
B. B. The Cocooning of the Technoable-----	14
C. C. The Virtual Organization -----	14
D. D. The Necessity of Strategic Alliances-----	14
E. E. Virtual Everything, Everywhere1 -----	15

#5 Transformational Leadership	17
A. Purpose, Value, and Vision-Driven	17
B. Transparent Organizations	17
C. Leaders as Visionaries	17
D. The Feminine Factor	17
E. From Competition to Cooperation	18
F. Empowered People Produce	18
G. Future Forecasting As a Core Competency	18
H. Continuous Personal and Organizational Learning	18
I. Hitting the Techno Saturation Point	19
#6 The Stressed Society	20
A. Thee Population Bomb	20
B. Maldistribution of Wealth and Support	20
C. Persistent Inequalities in Education and Training	20
D. Paradigm Paralysis in Education	21
E. Toward Individual Responsibility	21
F. The Graying of Canada	21
G. The Diversification of Canada	21
H. The Frustrated Center	21

Key Sources

The ideas in this document represent a thematic synthesis of the major information and insights drawn from a thorough reading of these and many other books.

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These sources give us the following highly condensed picture of the world we all face as learners and performers.

1. The High Quality, Global Marketplace

To those who keep abreast of today's headlines about continual corporate downsizing, about the expansion and contraction of overseas markets, about the continued proliferation of new labor-replacing technologies, and about the squeeze on family schedules and resources, many of the following shifts and trends may already sound like "old news." The "Information Age" is no longer in the future; it is today's reality. But as Thomas Friedman makes clear in *The Lexus and the Olive Tree*, this globalization is more than economic. Politics, cultures, technology, finance, national security, and ecology have all taken on a decisively global character.

Certainly one of the most fundamental features of our Information Age is the High Quality, Global Marketplace that has influenced almost all businesses, no matter how small or how local their focus. Producers, suppliers, partnerships, and networks for all kinds of products and services come from all parts of the globe, which is blurring and redefining national interests as never before. Without question, anyone choosing to do or be involved in business today and tomorrow is going to be strongly influenced by the shifts, trends, and future conditions summarized below.

A. Quality is an Entrance Requirement

Quality products and services were once a distinct market advantage, but today they are taken for granted. Quality is literally the ticket to the game, as well as the key to playing it successfully. For both organizations and their employees, quality must become a way of being. It's the "Total Quality" experience that's expected and ultimately counts.

B. Customers as King

If you expect to sell it, it needs to have value for your customers, and they know it! New Millennium customers have countless options; unashamedly vote with their feet and pocketbooks; openly demand choices in products and services that are customized to their needs and tastes; want things now, not tomorrow or next week; expect quality and value and the price to go down, and willingly return things that don't suit them. Moreover, whether satisfied or not, they tell their friends -over the Internet. Even the rich expect to get a "good deal."

C. Quality and Success are Transitory

Because of the constantly accelerating pace of innovation and new developments, today's "state-of-the-art" can quickly become next month's "also-ran." As paradoxical and challenging as it may seem, smart companies innovate while on top rather than trying to ride the crest of the wave of their success for very long - recognizing, for example, that the only Computer or software you can buy at the store is already obsolete the moment it hits the shelf. The same applies to employee

expertise. The "smart" ones are constantly learning, upgrading, and preparing for the future.

D. The Seamless World Economy

With the growth of advanced communications and technologies, "e-commerce," and the emergence of the European Union, national economic borders are disappearing. The world is increasingly one large marketplace where ownership, resources, production, marketing, and sales can be dispersed throughout the globe. The direction of stock markets on one continent routinely affects the fortunes of those on other continents - on an hourly basis.

E. The Electronic Herd

Instantaneous, worldwide access to both financial and political information allows millions of otherwise unconnected/unrelated people across the globe to make decisions that collectively drive the political economics of nations and regions. Good or bad news, provokes immediate worldwide response - not just from governments and institutions, but from untold "day traders" who, in search of today's best financial bargain, can immediately withdraw or infuse hundreds of billions of dollars into a nation's economy that shows signs of economic, political, or moral strength or weakness. According to Friedman (1999), the impact of their uncoordinated decisions can quickly override the most rational planning and careful international negotiations.

F. Even "Mom and Pop" Can't Hide

Even the smallest most locally focused businesses are a part of this global web of economic interdependence and quality performance expectations. Decisions and actions taken continents away affect all availability of raw materials and products, costs, and prices. But locals must compete in terms of service as well as product. If your customers have been "anywhere," the quality of service they get in Chicago is what they also expect you to deliver in Bismarck.

G. China Is Coming

As markets and production become more global, the concentration of economic power is shifting dramatically. Formerly underdeveloped countries in Asia and Latin America are emerging as major world production centers and markets, while traditional economic giants struggle with widespread downsizing and threatened standards of living. Economists estimate that China itself will have the largest single national economy by the year 2015.

H. Doing Well By Doing Good

Being socially conscious and showing concern is not only the moral thing to do; it develops customer support and financial profitability. Companies that invest in enhancing and supporting the common good appeal to the deeper sense of right and

morality in their potential customers, thereby generating highly beneficial "good will." This is particularly true of the attention given to the fragility of the global environment. Consumers are demanding that companies act responsibly toward the environment - and they patronize them when they do.

I. English as the Common Global Language

From travel, to business, to sports, to science, English is becoming the common global language, largely as the result of the enormous influence of the Internet in both business and personal affairs.

2. Transformational Technologies

Transformational technologies are driving the Global Marketplace. As one major trend tracker put it recently. "We have let the technological genie out of the bottle, and no one knows how to get it back in." Consequently, individuals and organizations find themselves simultaneously empowered with powerful and efficient tools that were almost unimaginable a decade ago, yet even the latest technological tools are vulnerable to imminent obsolescence - including the conventional confirmation of today's extremely powerful desktop computers.

Clearly these constantly advancing technologies have already transformed the very meaning, structures, and processes of work and recreation. The potential for further transformation seems to be exponentially related to the pace of advances in the current state of the art. One book that captures the profound implications and complexities of this major future trend particularly well is Nicholas Negroponte's *Being Digital*.

A. The Internet

The Internet and other closely related electronic communications systems have already made access to vast arrays of information on every imaginable topic readily accessible, immediate, and inexpensive to hundreds of millions of people, thereby reducing the need for hard copy media and stimulating the market for related hardware, software, and operator expertise. In addition, the Internet is dramatically facilitating the emergence and growth of information-based cottage industries across the planet.

B. e- Everything

Digitized, binary electronic impulses became the common form of transmitted information during the 90's. As the electronic processors of that information became more sophisticated, the distinctions among telephones, televisions, faxes, home entertainment systems, printing presses, and computers have already blurred. This, in turn, is spawning amazing forms of electronic gadgetry from which both businesses and consumers benefit. The ever-increasing speed, versatility, and quality of digital processors and the exploding array of sophisticated software that accompany them have impacted and redefined virtually every sector of life. It's easy to see that early in the New Millennium, everything seems to have become "e."

C. Interactive Machines and Tools

As the machines and the computer processors and software that drive them continually get smarter and far more versatile, users need only to talk with their machines to directly control the machine's processes, functions, and output. Advantage: both the "smart" machine and its "smart" human designers and operators. The smarter they both get, the more productivity soars.

D. On- Demand Interactive Communication

As communication technologies become smarter and more versatile, control and power shift to the "smart" user, who can control not only what (parts of) transmissions to access, store, and use, but when and where to use it. Fixed schedules for broadcasting and observing programs or any other information source disappear, as access becomes user-flexible and user-influenced, creating a major quandary for those who depend on selling advertising time.

E. Miles Are Meaningless

With the rapid expansion of "online" and satellite technologies - all happening in real time - many former "face-to- face" interactions are no longer necessary. "Friction -free transactions" enable work, business, purchases, sales, conferences, education, training seminars, research, publishing, and a host of other common activities to be handled from remote locations with no need for face-to-face interactions. Outsourcing "word work" to New Delhi is as fast and easy as outsourcing to a downtown provider.

F. If It Doesn't Require High Level Thinking, You're Vulnerable

As machines are built to do more and more sophisticated things faster and faster, non-thinking, repetitive jobs continue to be eliminated. The economy of this transformational Technology Age requires highly skilled, self-directed learners and thinkers who can't be replaced by a more sophisticated robot, suggesting that the right kind of education can forge a tight link with a high paying career.

G. Where Has All the Paper Gone?

With increasing sophistication in technologies, digital media, and software comes the disappearance of now familiar tangibles and the need to store and safeguard them. Paperless offices, paperless wallets and address books, Palm Pilots, smart cards, and "just in time" delivery head the list of innovations that use electronic memory to supplant paper records and reduce costly inventories.

H. e- Dependence

While the marvels of the electronic genie are obvious, our dependence on immediate and undistorted access to this e-world is just as clear. From the failure of electronic power grids, to the spread of software-destroying viruses, to the disruption of e-networks, to the invasion of national security computer systems by determined hackers, there is ample evidence that the other edge of the e-sword may be as lethal as its positive side is beneficial. While the genie has liberated and bolstered the "technoable," it may have not so subtly jeopardized them in the process.

#3. The Adept, Empowered Employee in the Nimble Organization

As the previous shifts and trends suggest, there are enormous pressures today on both individuals and organizations to be future-focused, capable of change, technologically adept, light on their feet, and constantly learning and improving. Those individuals who are capable of this kind of forward-looking self-direction become invaluable assets to their organizations and may represent the difference between the organization thriving and it going out of business.

As a result organizations must learn to utilize and capitalize on the unique strengths of their employees. Just as employees must continually reassess their capabilities, talents, and potential contributions to their organizations. The dynamic that results is dramatically different from the "fixed skills/fixed career" employment and organizational patterns of the now-departed Industrial Age. No books make this theme of "continuous learning, adaptation, and improvement" clearer than Peter Senge's *The Fifth Discipline* and Bill Gates' *Business at the Speed of Thought*.

A. Change is the Only Constant

For both organizations and their employees, change is inevitable, improvement is imperative, and survival is optional. Survival results from the ability to use the emerging technologies more adeptly adapt in more insightful and constructive ways and be more productive. Individuals and organizations that want to be successful face the challenge of continuously learning improving, and changing. Diplomas and credentials have the shelf life of a ripe banana.

B. Mass Customization

The Global Market is pressing for products and services that meet highly specific needs. Nimble organizations must find ways of anticipating and meeting those individual needs quickly on a mass scale. Advanced technologies in the hands of adept employees can achieve the mass customization necessary for capturing and sustaining viable markets for the organization-s products/services. Meeting unique customer needs is more a matter of managing information in a timely manner than maintaining large inventories of tangibles. Prime example: Amazon.com can customize service to its 3.1 million customers daily.

C. Small is Powerful....

Smaller organizations are consistently beating larger organizations to the future in almost even way. Smallness encourages clearer focus, better communication, less bureaucracy, and more rapid decision making and response to changing conditions and opportunities. Large organizations are decentralizing into smaller units capable of focusing and applying their expertise to specific market opportunities. Vision-driven teams of empowered, expert employees who enjoy greater autonomy and

increased responsibility for their results are replacing hierarchical direction and oversight.

D. The Quick Get Richer

In virtually every industry involved in e-commerce, those able to get their creative initiatives and products to the market soonest have been able to capitalize on the huge demand for innovation and efficiency that drives the ever-expanding technology-related marketplace. This has forced the time from conception of an idea to its tangible appearance in the market down from years to weeks in some industries.

E. Competence as Capital, Knowledge as Power

The knowledge and technology explosions have also shifted the nature of work and the determiners of organizational success. By the 90's, most organizations' greatest assets had already become its people's expertise and commitment, rather than its capital equipment or hard assets. Recruiting, developing, and utilizing competent, growth-oriented staff - or buying companies with exceptional staff capacity and promise - has replaced the accumulation of capital as an organization's best assurance of staying competitive.

F. The Rise of the Independent Contractor

Whether in sales, management, or clerical work, a combination of automation and advanced communications technologies are allowing both producers and consumers to get things done either directly or online, thereby rendering the middle-person an increasingly endangered species. The antidote: the proliferation of the "independent contractor" - highly competent and motivated, self-directed, continuously improving individuals - who often become consultants (to their former employers) or small business entrepreneurs. They move from job security to "jobless security" by making every day count and embodying quality, entrepreneurship, passion, and professionalism at their best.

G. The Twenty-Four Hour Economy

As the market and telecommunications become more global and sophisticated, traditional work schedules are disappearing. Business can be transacted at any time from anywhere, giving both organizations and employees greater flexibility over work roles and schedules. The greater the technological expertise of the employee, the wider the range of work role and scheduling options that is potentially open to them.

H. The Pervasive "Value-Added" Agenda

Organizational success is ultimately linked to two factors: 1) defining a unique mission that 'adds value' for the customer, and 2) personnel who "add value" to the organization's productivity. Organizations add value for the customer by occupying one of three distinctly different market positions. These missions involve either

providing low-cost, hassle-free service, the leading product in the field, or a unique solution to the customer's problem. Success comes to those that clearly pursue one of these three missions rather than trying to pursue mixed missions. Employees face enormous pressures to add value as well: by needing to be empowered and act on their own initiative, by being productive and adding to the organization's bottom line," and by being accountable for the results they achieve. Either organizationally or personally, it's a matter of adding value or you're "out."

4. The Virtual Workplace

When you pull together all of the trends and implications described so far, the transformation of the workplace comes as no surprise. Increasingly, sophisticated technology is making work and productivity less dependent on the fixed physical locations, face-to-face interactions and traditional eight-hour schedules that defined and drove businesses in earlier eras and economies. These are the conditions that are enabling small-scale, highly niche-oriented, "cottage industry" e-businesses to emerge everywhere. Among the many books on our list of Key Sources that address this phenomenon, Bill Gates' *Business at the Speed of Thought* is particularly insightful.

A. The Anywhere, Anytime Workplace

Through the power of communication technologies, more and more people are already working outside of the conventional forty hours per week job schedule and structure. Flexible schedules, job-sharing and teaming arrangements, and offsite locations place a premium on worker autonomy, responsibility, and the ability to "get the job done well" with minimum structure and supervision. These conditions are ready-made for capable and adaptable contractors or consultants who can deliver the goods" on terms that work best for them.

B. The Cocooning of the Technoable

Many with the education, technological tools, expertise, and motivation are choosing to isolate themselves from the intensity, frustrations, and dangers of urban life by moving to and conducting their work from more congenial, remote, idyllic rural settings that maximize their lifestyle interests, need for peace and quiet, and sense of personal fulfillment. This is a key feature of a more general "cashing out" process that has people opting for early retirement over greater income and continued career pressures.

C. The Virtual Organization

Sophisticated networking and outsourcing strategies make it possible to create a temporary organization capable of accomplishing just about anything without making major investments in employees, equipment, materials, or facilities. This is occurring in an increasing range of fields and organizations.

D. The Necessity of Strategic Alliances

In order to stay both competitive and "light on their feet," many organizations find it advantageous to form alliances, network, and contract for services with other organizations, even though otherwise proprietary information is being shared. The driving force in this proactive approach is a Win-Win model of capacity building. The right alliances build instant capacity and allow organizations to stay flexible and market-responsive, temporarily engage in low-risk growth, and mutually benefit from each other's unique resources. Even though these strategies give others

access to proprietary information and unique skills, entrepreneurs see more advantage to capitalizing on what others can contribute to their bottom line than to attempting to own and safeguard all of the ideas and expertise under their immediate control.

E. Virtual Everything, Everywhere

Virtual reality simulations enable consumers to experience almost anything in detail from their homes, including the tangible features of products which they can examine and order at their own convenience without every having to go to a store. So shopping malls are doubling as twenty-four hour per day cultural and recreation centers that fulfill people's needs to affiliate, exercise, develop, and express themselves. Just check out the Mall of America in the Twin Cities or the Metreon in San Francisco for a taste of tomorrow today.

5. Transformational Leadership

Without question, a whole new paradigm of leadership and organizational management is emerging in parallel with the shifts and trends in technologies, markets, careers, and organizations. Its essence is openness, flexibility, personal empowerment, intuition, the deep development and employment of intra and interpersonal capacities (called Emotional Intelligence by Daniel Goldman), and the capacity to manage increasingly complex and dynamic changes. While many important books and frameworks exist on the subject, Tom Peters' Liberation Management and Goleman's Working with Emotional Intelligence are must reads.

A. Purpose, Value, and Vision- Driven

Strategic Information Age leaders focus their organizations on the fundamental purpose for the organization's existence, its core values, what gives people meaning in their work, and the vision of what the organization and its people ideally want to become. These, in turn, will be the key motivators of highly competent, empowered employees. By contrast Industrial Age managers lead through hierarchical control and focus their organizations on past practices, precedents and formal policies and procedures.

B. Transparent Organizations

The society-wide demand for greater organizational openness and accountability is reinforcing a major trend in effective organizational change and adaptability: namely, honest, open communication is a key to effective leadership performance, organizational credibility, employee trust and motivation, and organizational innovation and productivity. The great demand by both consumers and employees for "want-to-know" information is supported by the technological capacity to make it available at the touch of a keypad. Savvy marketers are also learning that the more information they can make available to potential clients, the more interest they generate.

C. Leaders as Visionaries

At its essence Visionary Leadership is about working with staff to create and communicate a concrete picture of the organization's preferred future in a world of complex, dynamic change, and to identify and define the processes and strategies needed for translating that picture into reality. The premium here is for individuals who can think "outside the box" and inspire their people to act in an equally innovative way.

D. The Feminine Factor

Despite the enormous pressures women in the labor market face in handling child-rearing and other household management responsibilities, a large proportion of new businesses are owned and operated by women. They not only serve as a big source of employment, they represent a new, congenial, relationship-oriented approach to

management that balances the traditional command/control approach so widely accepted in male-dominated firms.

E. From Competition to Cooperation

Organizational success requires competing successfully in the marketplace through focused, cooperative endeavors among staff. The Win-Lose psychology of the Industrial Age has had to give way to the new Win-Win empowerment strategies among staff and organizational clients. Success depends on finding ways of channeling individual contributions into a total "team" effort, rather than having individuals and divisions compete against each other. Sharing, rather than hoarding, essential information is a key to enhancing the quality of the contribution team members can make. In short, cooperation in the workplace enables organizations to compete successfully in the marketplace.

F. Empowered People Produce

It works! Empowering qualified people to have more control over their work is both morally right and financially profitable. Empowerment honors the intrinsic motivation of people to use their expertise to best advantage and gives them a direct stake in achieving both personal and organizational success. Empowerment works best when employees deeply identify with organizational purpose, have a clear vision of where the organization wants to go, have a strong commitment to getting there, have the information, capabilities, and tools to get there, and receive the organizational supports necessary for accomplishing its vision.

G. Future Forecasting as a Core Competency

In an era of rapid and constant change, organizations must keep a steady eye on the future and chart their course on a clear picture of future conditions that are most likely to affect their clients, their markets, and their processes. Staying in business is often a matter of. 1) Continually engaging in competent and insightful trendtracking; and 2) Aligning the organization with the results of those analyses. In an era when "The Quick Get Richer," having this future-focusing orientation and capacity is a key determiner of both organizational and personal success.

H. Continuous Personal and Organizational Learning

With knowledge doubling every two years and new technologies emerging monthly, Information Age leaders and their employees are never finished learning and applying what they learn to the organization's continuous improvement. The key for leaders is to provide useful learning experiences for themselves and staff and establish clear and compelling ways for the organization to benefit from what everyone learns. Developing strategies for decision making based on new learning and developments is key to personal and organizational health and success. This continuous learning and improvement orientation is the heart and soul of the - Quality" movement.

I. Hitting the Techno Saturation Point

Technology is a two-sided coin that offers astonishing benefits at the cost of redefining human existence. Those who attempt to get and stay on the cutting edge of technological advances and their applications can devote so much time to the endeavor that they surrender control over their lives and forfeit the quality of interpersonal relationships, conventional forms of interpersonal communication, cultural and personal development, and balanced, healthy lifestyles.

Transformational leaders recognize, encourage, and support this necessary balance.

6. The Stressed Society

While the foregoing themes and trends clearly represent major forces shaping organizations and careers today and tomorrow, this is by no means a complete picture of what continues to shape the big picture of life in the Information Age. Included below are some key trends and conditions that must be considered in any broad picture of the immediate future. Among the many books that helped us identify and describe these major themes, two were key: Irving Laszlo's book *Vision 2020*, and Robert Theobald's book *The Rapids of Change*.

A. The Population Bomb

Assuming that the AIDS epidemic can be arrested, the world's population will double over the next forty years, and only seven percent of that growth will be in developed nations. The desire for improved standards of living by the poor, accompanied by pressures to sustain the high standards of living enjoyed by advantaged societies, will increase consumption patterns to dangerous levels and impose dangerous pressures on the planet's ecosystem and resources.

B. Maldistribution of Wealth and Support

The rich countries and their better educated citizens are getting richer while across the globe the poor continue to bear children in disproportionate numbers, thereby lessening their per capita incomes even further. Wide economic disparities across a country's social and ethnic groups are the leading predictor of political unrest and revolution, and they will continue to shape internal as well as international politics as long as the poor have access to media that continually remind them of options and material goods that they do not enjoy. The plight of the poor is being exacerbated in African countries by the explosion of the AIDS epidemic that is leaving countless children without parents, without hope for an education, and without the skills to sustain employment.

C. Persistent Inequalities in Education and Training

The demands for high levels of education and technological literacy are increasing at the same time that indicators of educational achievement for young people from low socio-economic backgrounds are either failing or barely holding steady. Because the advantaged segments of the society go to great lengths to ensure that their children have ready access to the most advanced and challenging learning tools and computer technologies available, their children are entering school with even greater advantages than before. This will only continue to widen the gap between those qualified for entry into the high paying high-tech workforce and those lacking the skills to do so.

D. Paradigm Paralysis in Education

The dynamic shifts and trends described in this document have unleashed a powerful political backlash against change that is felt most strongly in the education arena. Despite technologies that enable almost anyone to learn anything from anywhere at any time from worldwide experts, public education is being forced into an extremely backward-looking accountability stalemate. Both national and provincial "reform" policies are pressuring local educators to adopt traditional Industrial Age forms of everything educational and disavow anything that might carry the label "new" or "progressive."

E. Toward Individual Responsibility

Social programs are under attack for lack of effectiveness, government "waste" is the target of cost-cutters, tolerance for those needing governmental assistance is waning, trust in governmental solutions is low, and admonitions for all citizens to take responsibility for their lives are heard across the political spectrum. Increasingly "entitlement thinking" is no longer "politically correct" giving way to a growing consensus that "pulling your own weight" is "the Canadian way."

F. The Graying of Canada

The over-seventy segment of the population will continue to increase for the foreseeable future, resulting in a continued shift of products, services, political influence, and demands for public resources toward the elderly and away from the young people on whom the country's well-being ultimately rests. It also places enormous pressure on society's highly productive middle-aged population to maintain their careers and raise children while simultaneously tending to the welfare of dependent parents and grandparents.

G. The Diversification of Canada

If current population and immigration trends continue, the population balance in the Canada will shift to a non-Anglo majority during the early part of the 21st century. Paralleling this trend is a political reaction against the funding of social and educational programs targeted to "minority" population groups. As historically racial and ethnic minorities become the "majority" - as they soon will in school-age population of the Canada. Painful re-definitions of "minority" and entitlements are bound to occur.

H. The Frustrated Center

With ideology-driven activists on the right, ethno-focused politics operating on the left, and campaign contribution money flowing freely everywhere. The large, reasonably well-educated Canadian middle class is losing its patience with the politics of any faction it considers -extreme" or "special interest." When its implicit desire for decency, reason, responsibility, and honesty in public affairs appears to go unheeded by politicians and the press, it sends a clear 'No" message at the ballot box to those whom, it perceives are in charge.

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