

Welcome to the Age of the Fox



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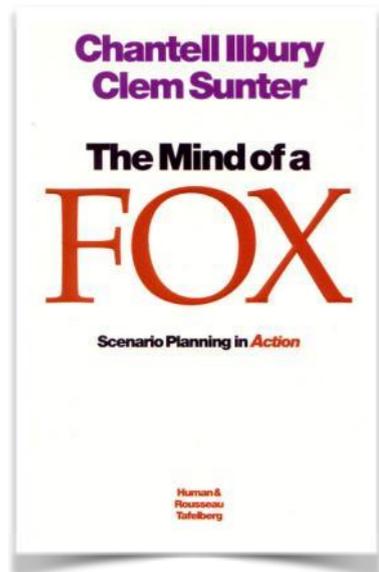
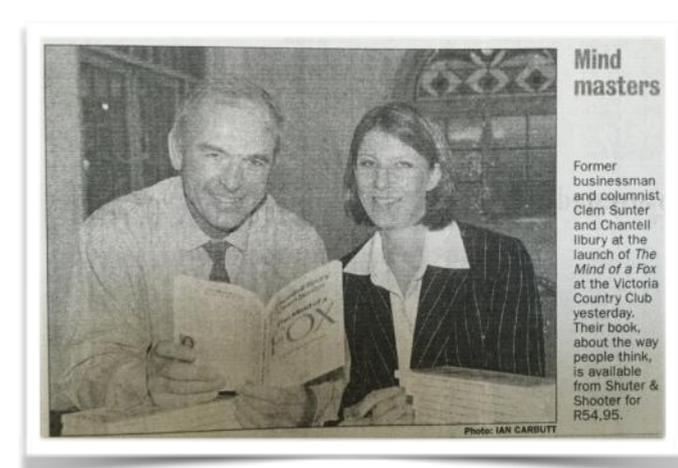
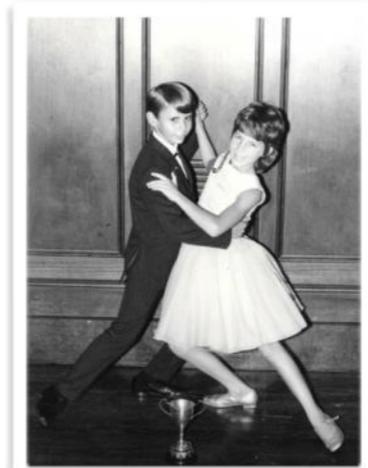
The mind of a fox

“The fox knows many things,
the hedgehog one big one”

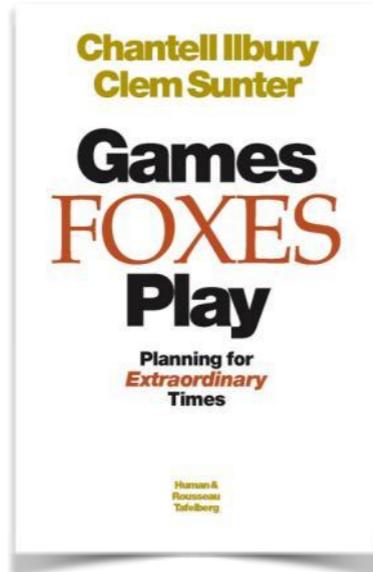
Archilochus c.650 BC



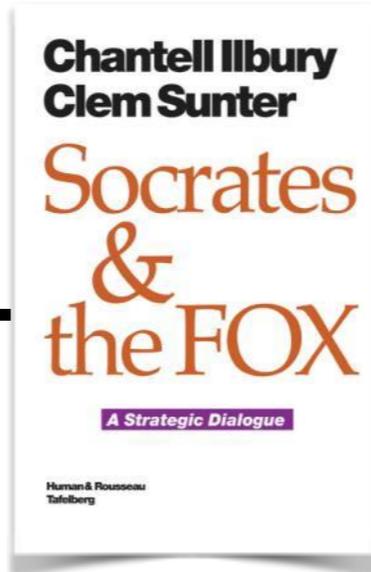
A Fox's Tale



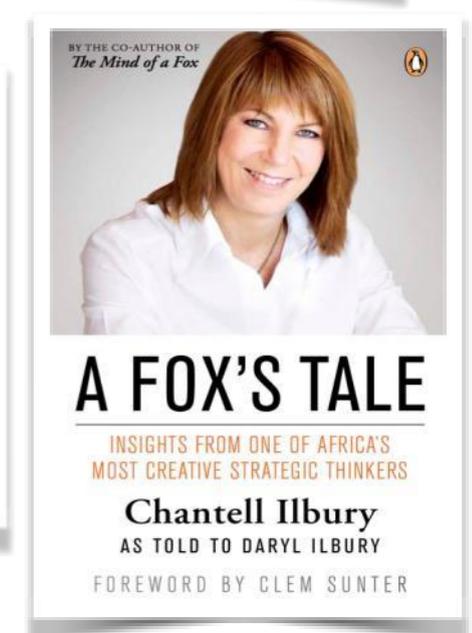
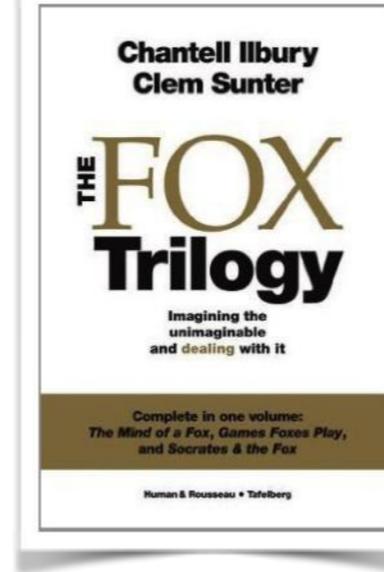
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Driving Forces Creating New Normals

Globalisation

Characteristics

Economic power shift

Economic interconnectedness

Complex trade and investment relationships

Greater risk for international economic and financial events

Declining barrier to trade

2020 BRICS and Mexico in top 10 largest global economies

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Leadership Characteristics

Strategic thinking and cognitive skills

Strong conceptual and contextual thinkers

Collaborative

Ability to lead diverse teams with no direct authority

Think global, act local

Digitalisation

Characteristics

By 2020 an entire generation would have grown up primarily in a digital world
Generation Y's social skills are developed through social media rather than direct interpersonal connections

Technology is shifting the balance of power away from organisations and their leaders and towards the consumer

Social media is eroding the boundaries between private and professional life

Together with technological conversion it will enhance disruptive innovation

Digitalisation

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Leadership Characteristics

- The ability to embrace creativity, curiosity and open minds
- Agility through social media
- Integrity and digital wisdom
- Agility**
- Content creators**
- The real impact of choice
- Power shift to consumer-driven business models**

Individualisation

Characteristics

Corporate power shifts to individual power

Increasing middle-class leads to increasing wealth

Increasing knowledge/education

Diversified needs, choice and tailor-made offerings

Lifestyle and technology shifts

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Individualisation

Characteristics

- Corporate power shifts to individual power
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- Diversified needs, choice and tailor-made offerings
- Lifestyle and technology shifts

Leadership Characteristics

Boss, mediator and coach

Loyalty and retention

Need to build relationships with flexible rules within a structured format
Relinquish own power in favour of collaborative approaches

Talent appreciation and development

Empowered consumer...

Building identity

Driving authenticity

Looking for accountability

Technological Conversion

Characteristics

Advances through biotechnology and nanotechnology

Disruptive innovation

Smartphone becomes smarter

Technological Conversion

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Leadership Characteristics

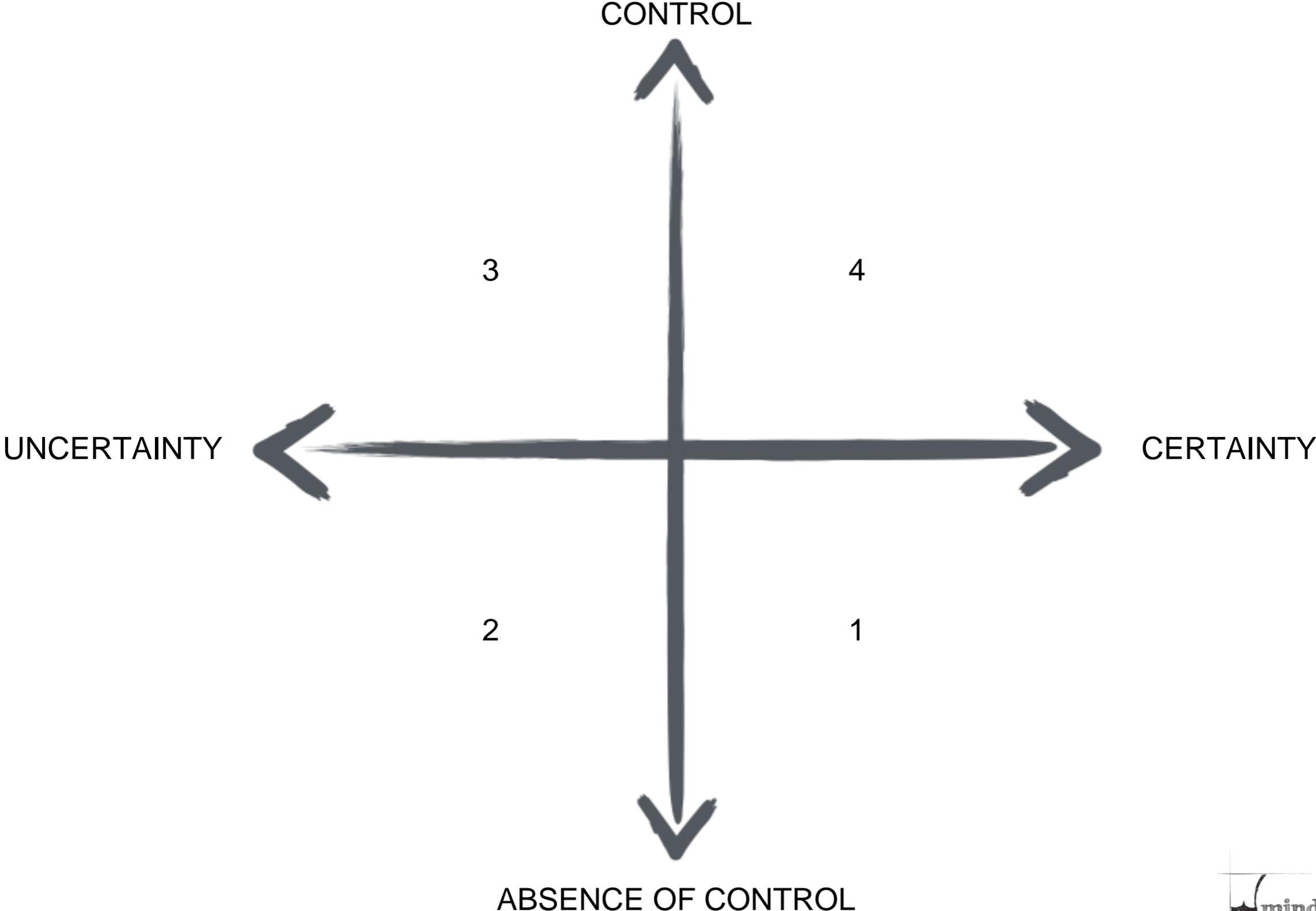
Companies will need to adapt to survive
Need to understand converging markets
Value-add more of a priority
Visionary ideas and investment in R&D
Producing new products in new ways
Consumers looking for convenience/efficiency
Looking for novelty
Expectations of innovation

Uncertainty, Complexity, Risk and Opportunity - The 'Glasshouse' Effect



More interconnected → greater uncertainty
→ less control → more risk → greater

The mind of a fox





Rising Global Flags

Rising Flags

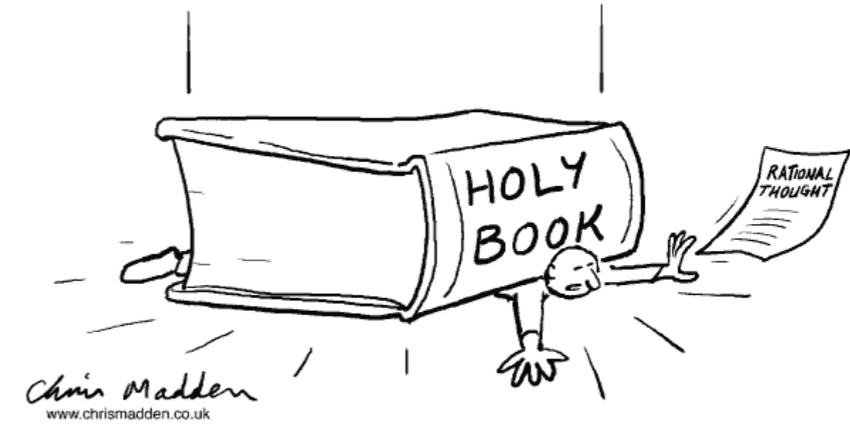
Explosion of religious fundamentalism

Growth of ISIS

Declaration of Islamic state

Gateways into Africa - Nigeria, Kenya

Impact on travels...no impact on global markets...yet



Russian assertiveness

Ceding of Crimea and influence in Ukraine

Changing the game in Europe

G8 to G7

Sanctions moving to 2nd level

Possible Cold War scenario?

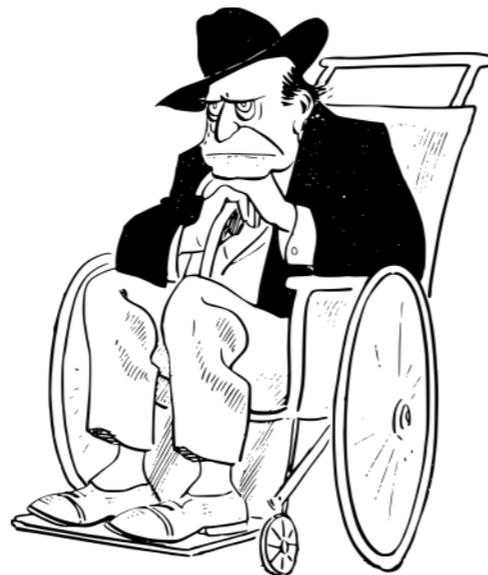


Grey flag

Ageing populations

Europe/Japan

US



Rising Flags

Climate change urgency

Increase in frequency of extreme weather events

Obama's current strategy re: coal emissions

Change in policy directions....will fundamentally change industries

Security issues



Growing anti-establishment sentiment

EU election results - shift to protectionism and nationalism

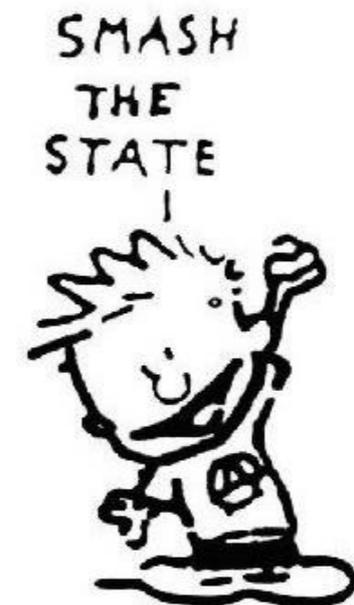
UK - Scotland referendum and cabinet reshuffle

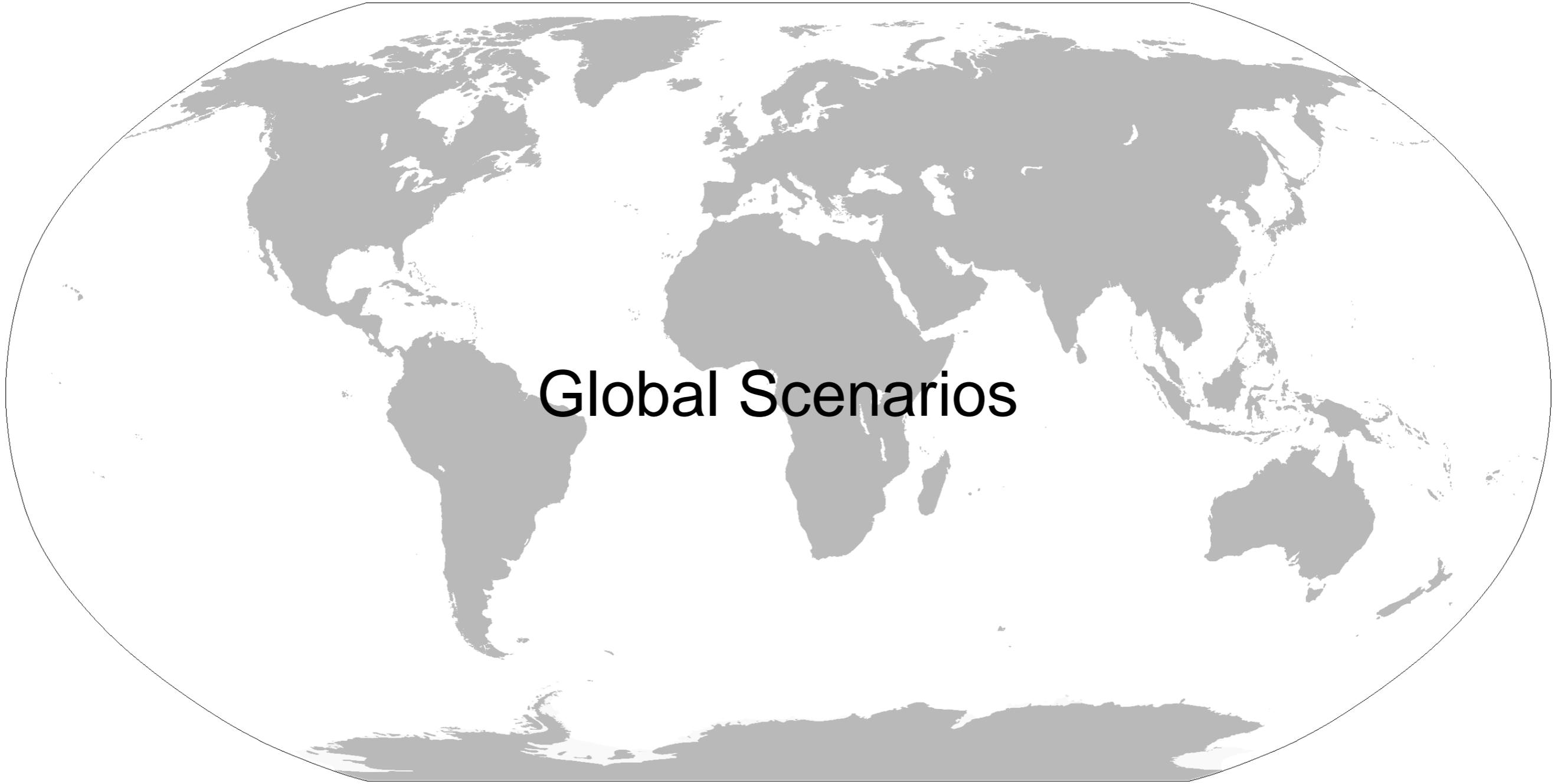
Brexit

Trump

Growth of EFF/SA municipal elections

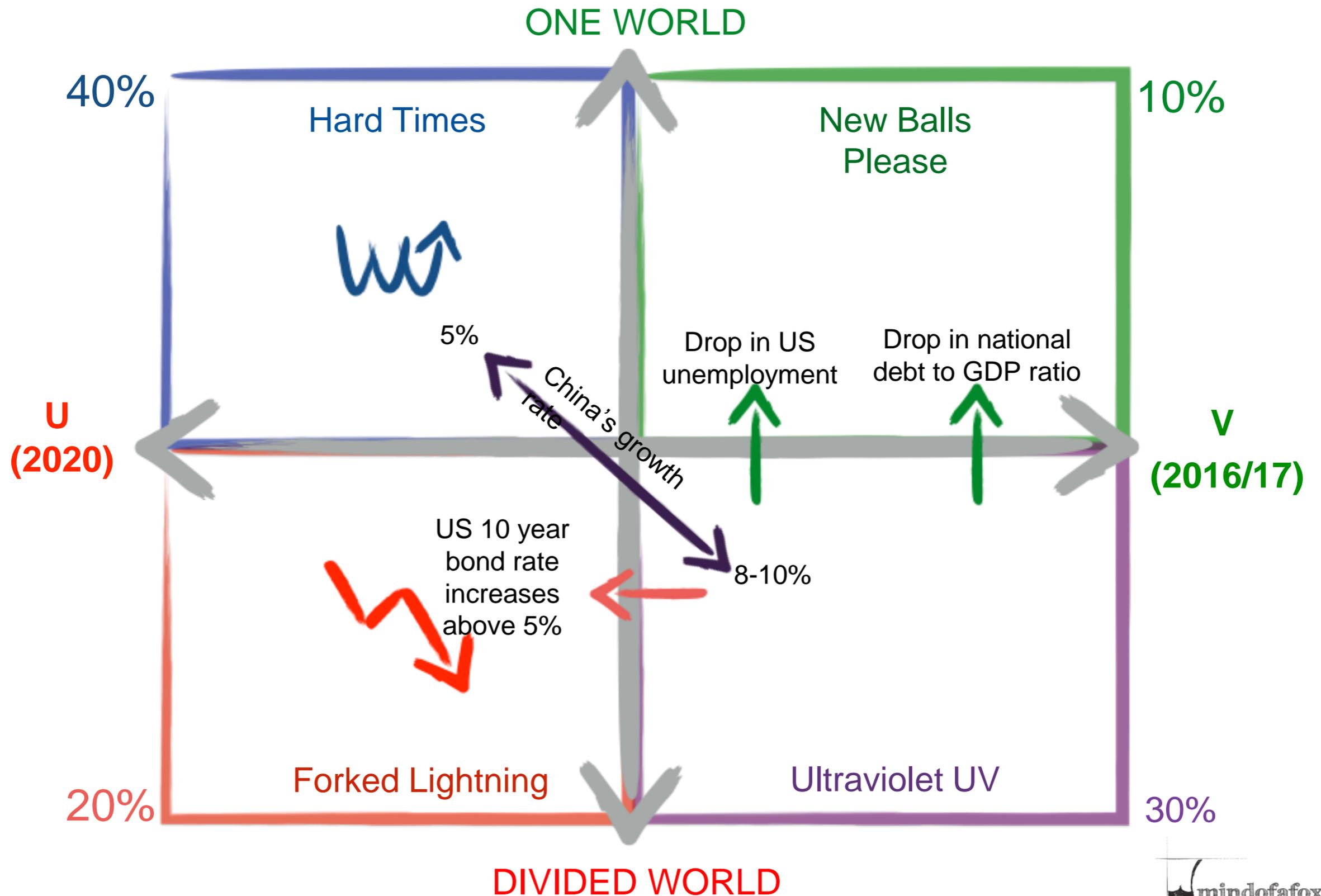
Middle-class are squeezed and more vocal





Global Scenarios

Global Scenarios



A black and white photograph of a vast, open landscape. The foreground is filled with low-lying, scrubby vegetation and rocky terrain. In the middle ground, there are rolling hills and valleys, also covered in sparse vegetation. The background shows a flat horizon under a bright sky. A prominent sun flare is visible in the upper left corner, and several thin, white contrails or clouds stretch across the sky. The overall scene conveys a sense of a wide, open, and somewhat arid environment.

Africa Scenarios



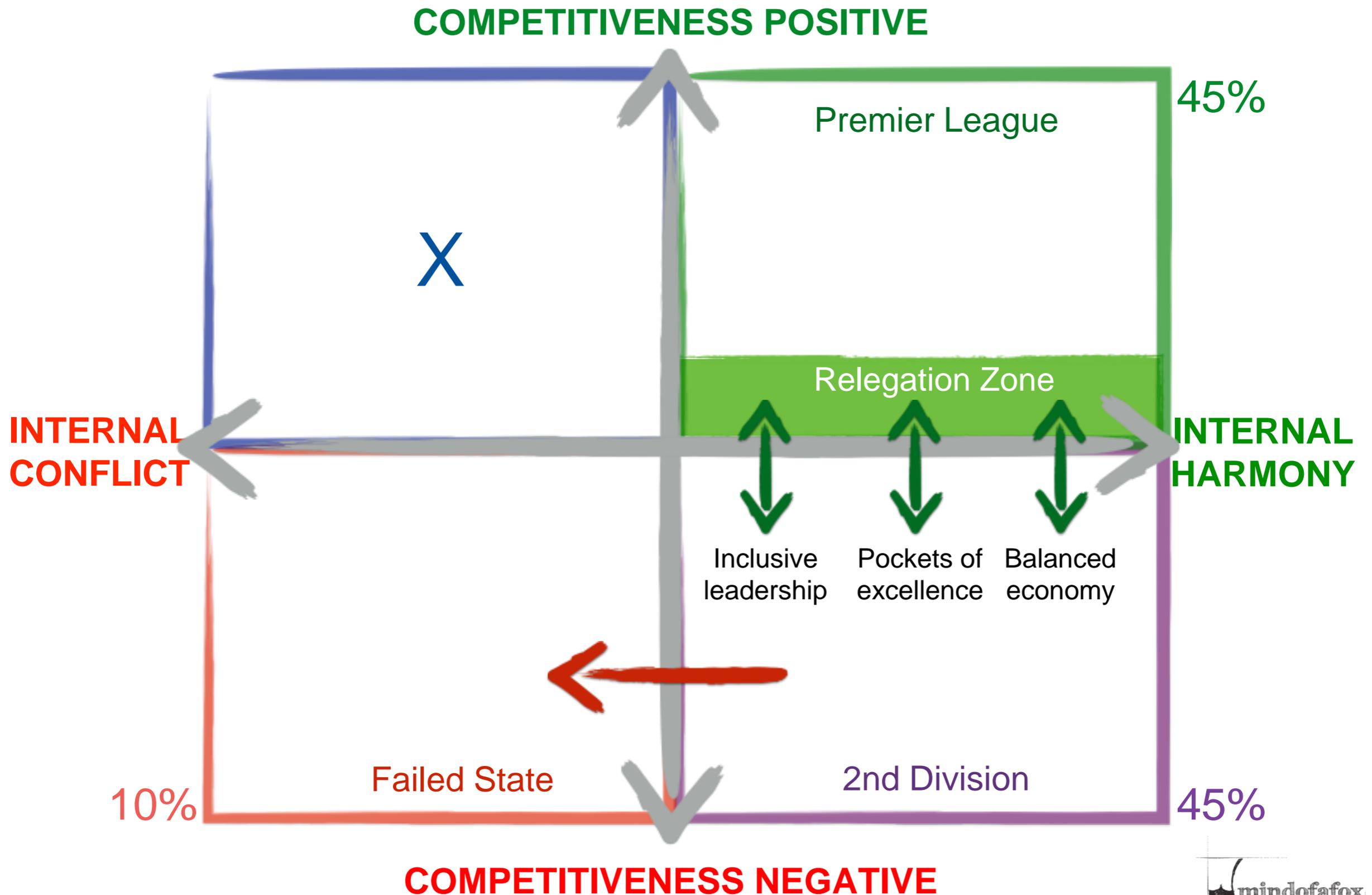
Africa Flags

Africa Flags

1. Corruption and crime
2. Quality of infrastructure
3. Style of leadership
4. Pockets of excellence
5. Entrepreneurial spark
6. Independence of judiciary and other institutions
7. Nationalisation
8. Land ownership



Africa Scenarios

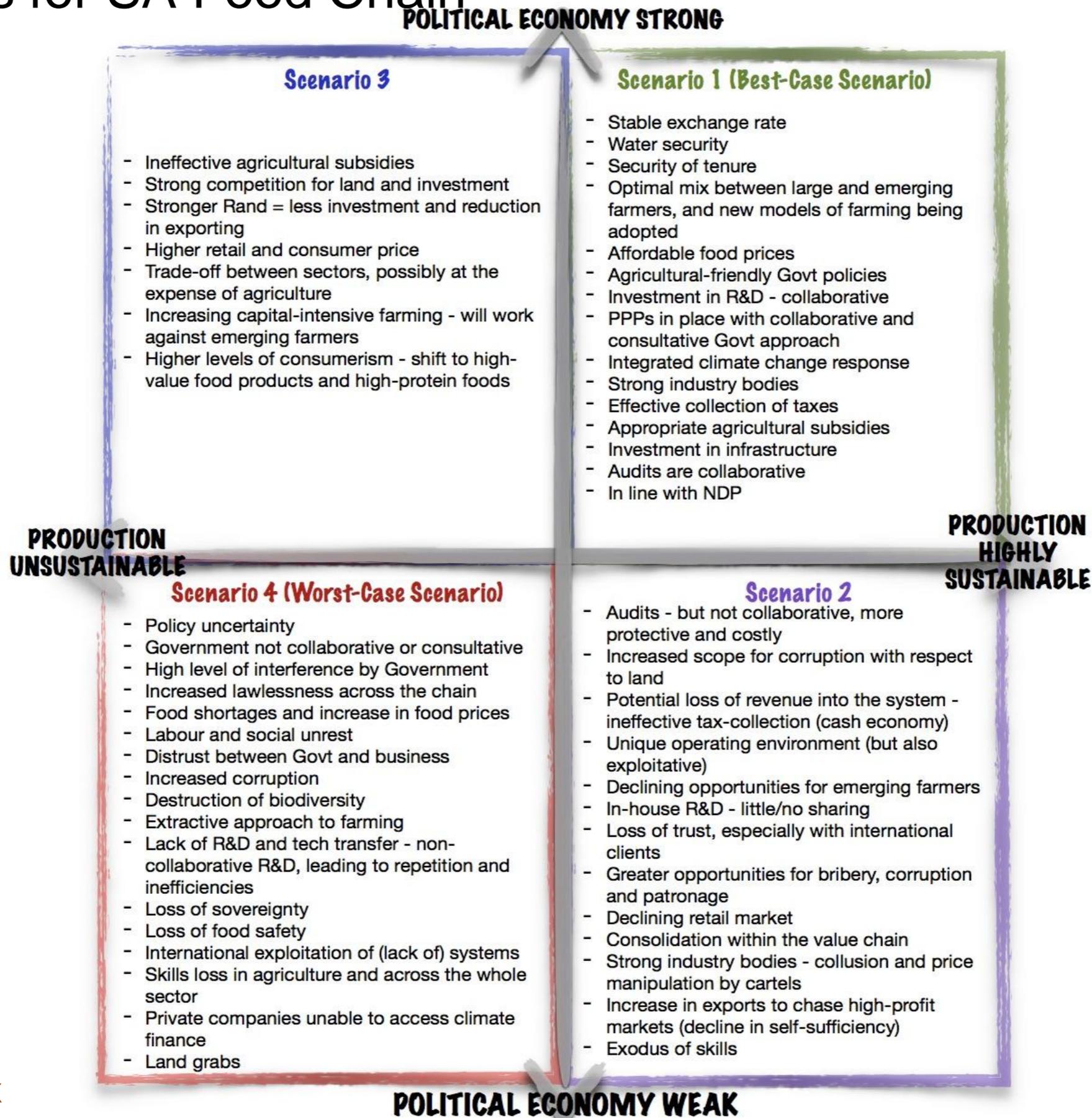


Characteristics of a winning nation

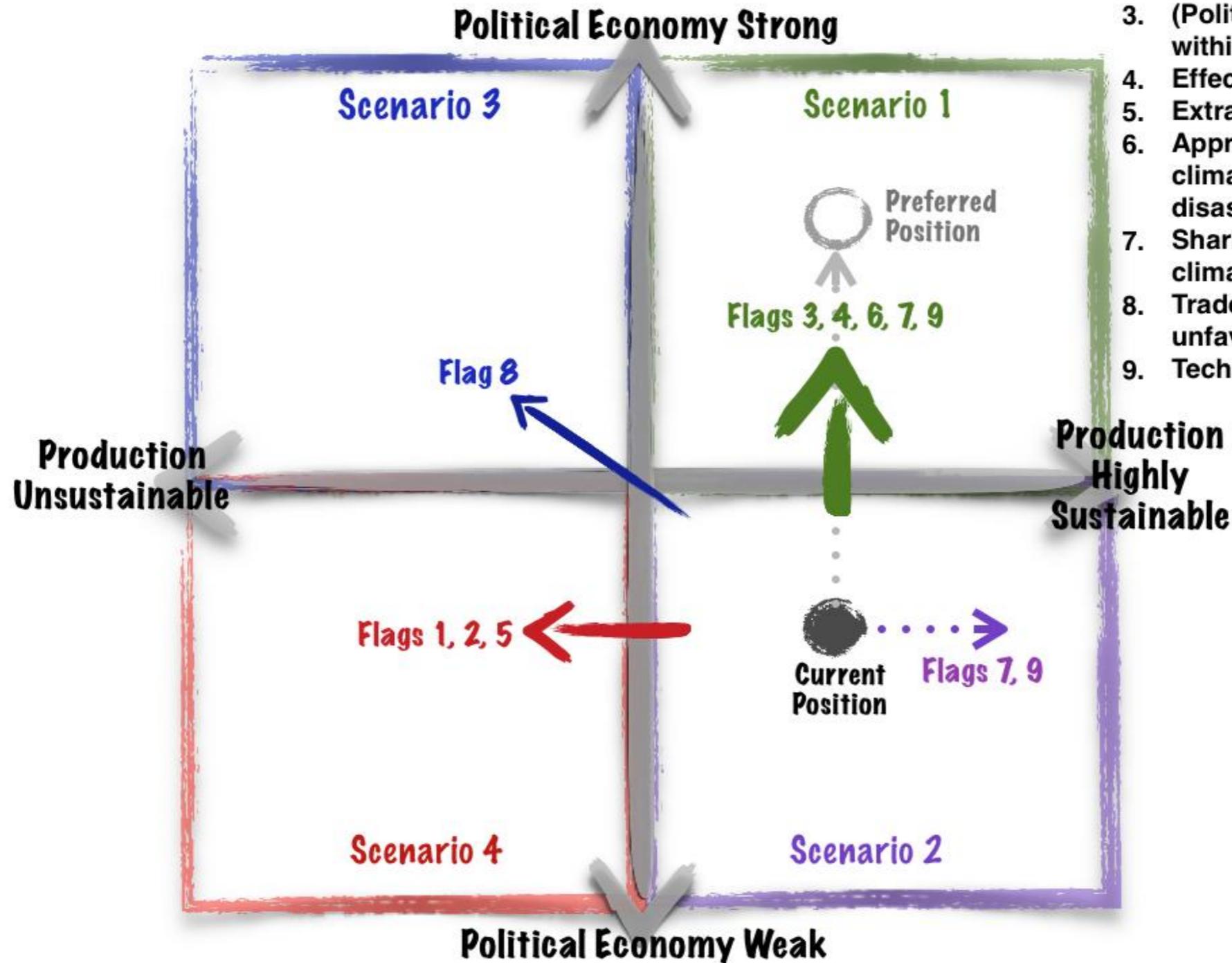
1. A good quality of education
2. A strong work ethic and spirit of entrepreneurship
3. A high rate of savings (and early access to capital for businesses that require it)
4. Adequate infrastructure to support a high-growth economy
5. Being an export-orientated global player that supplies goods and/or services to foreign markets that they can't get elsewhere
6. A dual-logic economy (big and small business work in constructive partnership)
7. Social harmony (citizens feel they are part of one team with a common vision)
8. Competitive personal and company tax
9. An attractive environment for foreign direct investment
10. Efficient government



Scenarios for SA Food Chain



Current Position and Flags

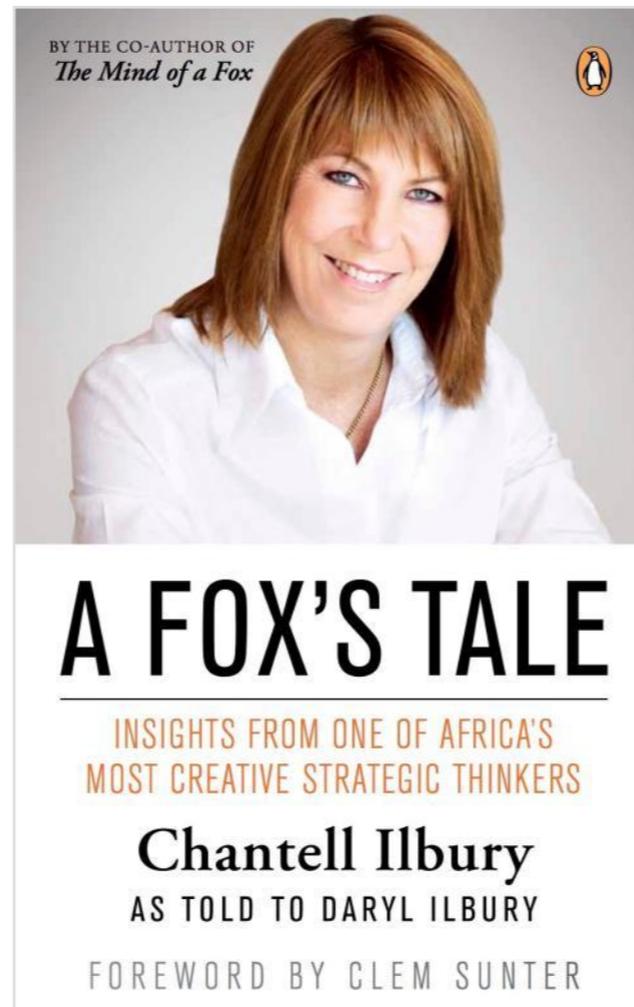


Flags:

1. Business-Government engagement
2. Shift to junk status
3. (Political) transformation within the supply chain
4. Effective R&D
5. Extraordinary climatic events
6. Appropriate response to climatic variability and disaster
7. Sharing of information on climate change
8. Trade agreements unfavourable to agriculture
9. Technical adaptation

Thank you...

...and may the Fox be with you...



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