



insight

ISSUES AND IDEAS FOR GREATER PHILADELPHIA'S LEADERS

VOLUME 3



2009

Connecting Globally, Prospering Locally



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MICROCHIP CITY



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EXECUTIVE EDITOR: STEVEN T. WRAY

EDITOR: ALLISON KELSEY

COPYEDITOR: CHRISTOPHER SCOVILLE

DESIGN: TETRA STRATEGIC COMMUNICATIONS

PRINTER: OFFSET IMPRESSIONS, INC.

PHOTO CREDITS: COVER, P. 2 (TOP), PP. 4-5 (BOTTOM), P. 7 (BOTTOM),
P. 8 (LEFT), P. 9, AND P. 11 (TOP) : ISTOCKPHOTO.COM

P. 10 (LOWER LEFT), POWERPHOTOS

P. 16: CLOCKWISE FROM TOP: UCSF, LEWIS SOMMER/ SAN FRANCISCO
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THIS VOLUME OF INSIGHT WAS UNDERWRITTEN BY
THE WILLIAM PENN FOUNDATION.

TO COMPETE, WE MUST CONNECT

Boil down the lessons we learned at the 2009 Greater Philadelphia Leadership Exchange in September, and that's what you get. Don't think of a region as a factory cranking out products, the experts tell us. Think of a region as a network, a hub, a circuit board – pick your metaphor, as long as it reflects that Greater Philadelphia can thrive only by connecting people and businesses with a global economy that is far bigger than any one city or region.

That's why "connectivity" is the theme of this edition of Insight. It's what everybody wants. Start with businesses: they want to connect along what sociologist Saskia Sassen calls "specialized circuits" that span the globe. In these pages, we join Sassen as she follows the links between Sao Paulo's coffee traders and New York's commodities brokers, or Mumbai's developers and London's dealmakers.

The days of the self-contained "imperial city" are done, Sassen says; instead, businesses look for places that offer the best connections to the global circuits of capital, labor, products, and expertise they depend on. Meanwhile, workers want to connect with healthy businesses and with the kind of community and lifestyle they desire. You'll read workforce expert Charlie Grantham emphasizes the importance of attracting and retaining the "free agent" workers who represent the future of labor. "The old model of attracting companies with tax breaks and free land is over," he says. "Companies will find a way to bring the work to wherever the talented people are."

Visitors want to connect with the unique aspects of our region, but they don't want to disconnect from the global systems they're used to. As community investor Jeremy Nowak explains, people are wowed by the Philadelphia Museum of Art, but what does not impress is a transit system that won't let them buy tickets with the credit cards they can use elsewhere in the world. "Tokens aren't quaint," Nowak says, "they're obsolete."

Even the entertainment economy must respond to growing consumer demand for hyper-connectivity. As Rick Bluhm of the Franklin Institute explains, museums and theaters now take their cues from such complex, multi-player games as World of Warcraft. Nintendo Wii, the nation's top-selling video game, is distinguished by its motion-sensitive, interactive controllers. "The more senses involved, the more decisions there are to be made, the more deeply you can draw the participants into the world of the game, the better," says Bluhm.

In other words, global connectivity is already changing the way we live, work, and play. Businesses and consumers are adapting; the successful region will adapt, too.

And while Greater Philadelphia might not achieve the global clout of a Tokyo, Paris, or Singapore (size alone being a limiting factor), it's clear that this region has a solid and enviable position on more than one global circuit. The most obvious are those of health care and education – people and businesses worldwide tap into this "meds and eds" economy. Industrial, cultural, financial, and legal circuits network our region, and the more we can do to boost their connections to employees, markets, and global partners, the better our region's economy will perform.

When looking at global rankings, it's tempting to focus on how Greater Philadelphia can knock off the competition and jump above cities like Boston, Toronto, or Osaka. But the message from this Leadership Exchange was to change that conversation. Don't ask whom Greater Philadelphia competes with; ask whom we *connect* with.

And don't just concentrate on the obvious; as scenario planning expert Roch Parayre tells us, the successful region must always be building new connections at the margins of its established networks. "Normal times bring normal opportunities," he says. "Significantly superior opportunities come in times of disruption – but only if you're ready."

It's those connections that light up the circuits that make the global economy go. Connectivity and prosperity go hand in hand.



A handwritten signature in dark ink, appearing to read "Steven T. Wray".

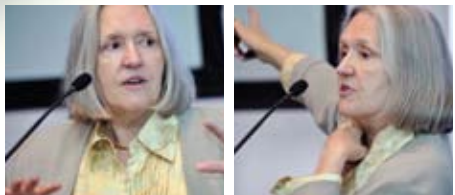
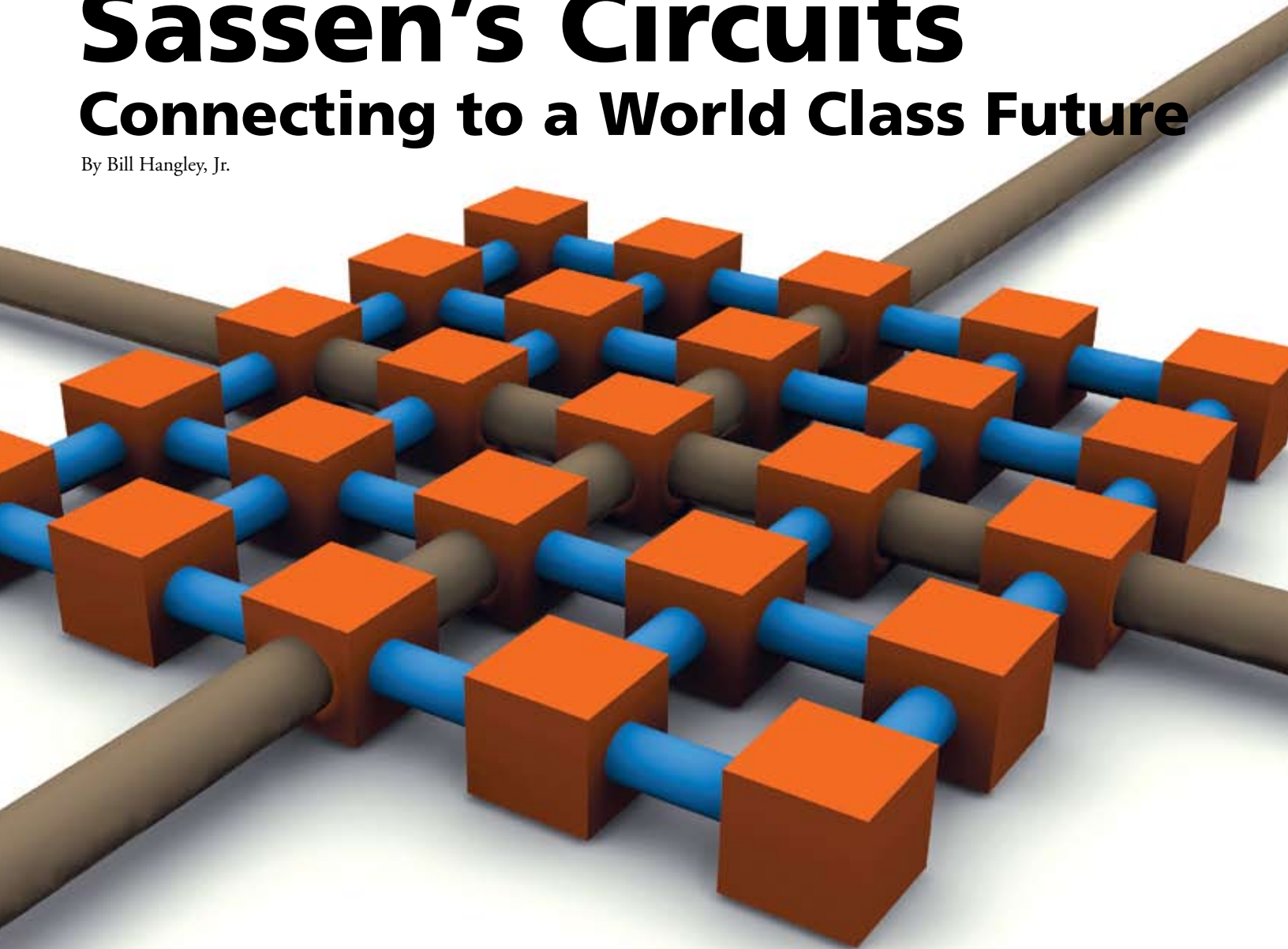
Steven T. Wray
Executive Director
Economy League of
Greater Philadelphia

UP FRONT

Sassen's Circuits

Connecting to a World Class Future

By Bill Hangley, Jr.



Saskia Sassen was ahead of the curve. It's been almost two decades since she coined the phrase "global city" to describe the world's great economic and cultural hubs. Since then, globalization has gone from novel concept to unavoidable economic and political reality, and Sassen, a sociologist now based at Columbia University, has become one of the academic world's go-to sources for analysis of the future of cities.

These days, Sassen's question is not whether global cities exist, but how exactly they compete and complement each other.

Her findings offer some important clues for a region like Greater Philadelphia that aspires to rise in the global ranks. "One common notion is that cities compete more and more with each other because of globalization," she told the Leadership Exchange. "I want to contest that point. Specialized differences of cities matter. Sure there is redundancy in the system, but there is far less redundancy than meets the eye."

What makes a global city, Sassen says, is not its individual output of products or ideas, but the strength of its position on what she calls "circuits" of global economic and cultural activity. Finance, banking, manufacturing, technology, commodities trading, media, education, health care – these are just a few of the countless circuits

along which the world's business travels. Each circuit passes through multiple cities and regions: a commercial real estate circuit connects London's dealmakers with Mumbai's booming markets; a commodities circuit connects Sao Paulo's coffee with New York's traders; a cultural circuit connects the fashion trends created in Paris with the films and television shows created in Los Angeles.

That means that cities should not be considered in isolation. Every city depends on the circuits that link it to the rest of the world, and no city or region, no matter how big, has total control of any circuit. "The old days of the imperial city," Sassen says, "are over."

And while many discussions of global cities focus on rankings – who's number

one, who's rising, who's falling – Sassen's theory suggests that such hierarchies are misleading and oversimplified. Cities aren't sumo wrestlers who need only to push the competition out of the ring. They're more like giant switchboards. They succeed by attracting traffic and helping it flow smoothly along circuits that span the globe.

ESCAPE FROM THE RANKING RAT RACE

Sassen's theory is good news for a region like Greater Philadelphia, in that it offers a way out of a seemingly impossible challenge. In surveys and rankings of global cities, Philadelphia invariably falls into the middle tiers. The top spots are always taken by historical powerhouses like London or Tokyo, or emerging-market capitals like Mumbai or Seoul. The 2008 World-wide Centers of Commerce Report is typical: it ranked Philadelphia at #18, behind Paris, Singapore, and Sydney, but ahead of Osaka, Berlin, San Francisco, and Brussels. Philadelphia could certainly improve its relative position among those second-tier cities, along with its rankings for various specific factors like ease of doing business or quality of life. But given Philadelphia's size and place in the world, its chances of it working its way onto the very top of the list would seem vanishingly small.

What a region like Greater Philadelphia can do, Sassen says, is improve the way it takes advantage of the global connections it already has. It is not inevitable that economic activity travels to the cities ranked highest overall. Instead, Sassen says, a given circuit of business will flow to those places that offer the specialized knowledge and the connections that that business needs.

"If you're a steel company, and you want to go global, you don't go to New York. You go to Chicago," she says. "They know how to handle the specialized services, the knowledge economy of steel. In New York, they don't know that as well." In a similar vein, anyone doing business in China can choose between three major financial centers: Shanghai, Hong Kong, and Shenzhen. But different kinds of business flow to each of the three cities, because each specializes in a different kind of service. "They are profoundly different," Sassen says.

Sassen doesn't deny that cities compete along these circuits; but the competition

is not always where one expects it. New York and Chicago, she says, each rank high on the global list of financial centers, but when one drills down into the details, it emerges that their specialties are such that they don't compete nearly as much as conventional wisdom would suggest. In fact, Sassen says, Chicago's biggest competition for its particular blend of services comes not from North America, but from Frankfurt, Germany.

What circuits are we on, and how do we improve our global connections along those circuits?

Thus the key question for any city seeking economic growth isn't, "Who's ranked above us and how do we unseat them?" The question is, "What circuits are we on, and how do we improve our global connections along those circuits?"

HISTORY IS KNOWLEDGE

The answer to the first part of that question, Sassen says, lies in a city's history. This is particularly true of those cities that aspire to play a role in the so-called "knowledge economy." The modern global city thrives, she says, by finding markets for the knowledge it developed during its period of material growth.

"Where does the knowledge economy come from?" Sassen asks. "The most common answer to that question is, it comes from the brilliant minds of the creative class. No. That's too simple. We play a role, but I really think that the deep economic history of a place matters much more in today's economy than it did thirty years ago."

"Think Chicago: heavy manufacturing, heavy agriculture, millions of pigs, heavy transportation," she says. "So how does a knowledge economy get extracted from those material economies? Running a million pigs, running steel mills, takes knowledge. But it's knowledge that's embedded in material practices. At some point a switch happens. That's where the creative class comes in – how do we extract the knowledge embedded in material history and make it into something that can then circulate?"

Chicago made the switch; its expertise in managing steel production today has roots in its history as a manufacturing

boom town. London's pre-eminence in global business deals has roots in its history as a colonial capitol, managing a far-flung empire.

Seen in this light, while Greater Philadelphia's overall rankings may not be what its advocates would hope, the region appears to be following Sassen's blueprint for success. Over generations, the region has built a vast store of material experience providing health care and higher education. It is now firmly plugged into the global circuits for both, carrying a flow of practical knowledge to students and health care professionals around the world.

COMPLETE THE CIRCUIT

To take the next step, Sassen says, Greater Philadelphia should not ask how to compete with other health care and education centers, but how to connect with them. "If I were in Philadelphia," she says, "I would disaggregate, disaggregate, disaggregate" – meaning, break down the region's various economic sectors to find out how they connect with other parts of the nation and the world. "Then you begin to see which other cities are working around a certain sector."

In other words, find those groups of cities, and you've found the circuit. Improve the conductivity of those circuits – hundreds of which, Sassen says, pass through Greater Philadelphia – and the region's global profile will rise.

The global city is a node in a network, and it draws its strength not from its individual power but the collective of which it is a part.

This region may never rank in the very top tier of global cities. But it already has a place in the global flow of knowledge and information. Greater Philadelphia's challenge now is to identify its global partners in specific sectors and strengthen the circuits that make those connections. No longer should a city be thought of as something like a factory, an isolated entity producing widgets and then selling them to the world. Instead, the global city is a node in a network, and it draws its strength not from its individual power but the collective of which it is a part. "In the global economy, what you need are many cities," Sassen says, "not one."

Jeremy Nowak: The Future of Live

Adapted from a presentation to the Greater Philadelphia Leadership Exchange, September 10, 2009



This isn't an easy time to be optimistic. And it may be the worst time to prognosticate. Most prognosticators have gotten some big things wrong recently, particularly economic predictions.

And when advocates for a region like Greater Philadelphia start asking about pathways to prosperity, most regional development soothsayers will give vague answers about finding competitive advantages, improving human capital, and being flexible in a world where change is disruptive, not incremental.

But it's my belief that any discussion of regional success has to start with one very simple question: in the future, how will people want to live?

The answer to that question gives us a glimpse into the values that may underpin regional success. In a world of escalating choices, lifestyle preferences may become even

more dominant drivers than they are today. And as muddled as things may seem, I think we're beginning to see the outline of the regional lifestyle people will seek out in the years to come.

Based on my work here and around the world, I see four principles that should guide any region that wants to thrive in the years to come:

ONE: SUCCESSFUL REGIONS WILL BLEND GLOBAL CONNECTIVITY WITH LOCAL IDENTITY

These two things may seem contradictory, but they're two sides of the same coin. People want to be plugged into the networks that make the world go, but they don't want to live in featureless strip malls. They want access to authenticity even as they enjoy a high level of global connectivity.

Let me share a very concrete example: recently I traveled to Lisbon, Portugal.

It's full of interesting things that make it unique. When I want to take public transportation to experience these things, I can walk up to a machine in the metro and stick in the same credit card I use everywhere else in the world. I select "English" as my language and in seconds I have not only tickets but directions.

Folks around here know that SEPTA doesn't work that way. You can go to metro systems in interior China and get a smart card, but here you wait in line for a token. It's a system the Soviet Union would have been proud of. While "quaint" can be attractive, tokens aren't "quaint," they're obsolete. The system defies easy access.

So connectivity, in this case, means having systems that are decipherable and welcoming to everyone, whether it's a tourist from Germany who wants to see the Liberty Bell or a teenager from the New Jersey suburbs who wants to shop for used re-

cords. People want to be in an environment that feels authentic and has a high level of public engagement. But they want to access that place easily using global systems that they have increasingly come to expect.

TWO: LET CITIZENS SELF-ORGANIZE, OR WATCH THEM LEAVE

It's my opinion that the information revolution is slowly rendering the present political culture obsolete. In many ways, the old system is already dead – it just doesn't know it yet. No longer do politicians and power brokers have a monopoly on information or civic organization. People know far more than they used to, and they have an unprecedented set of tools with which to organize themselves.

Successful regions will let that organization happen. The region that allows obsolete systems to choke the creative contributions of informed citizens will lose those citizens.

What's amazing is just how powerful this

kind of self-organizing can be. Take the new Schuylkill River Park. It's truly an impressive place, down by the Art Museum, alongside the CSX freight train tracks. You can go there any day of the week and see a constant stream of people walking, running, biking, and pushing their kids around in strollers. It's exactly the kind of place people want in a modern city, and it all started with the people who live there. They're the ones who figured out how to get the city and CSX to let it happen.

To me, that park represents the triumph of informed, networked, self-directed citizens. The people behind Schuylkill River Park didn't just shut up when they were told to forget it because CSX needed a place to station its railcars. By fighting for their park, they created the kind of unique local environment we've already talked about.

The problem is that self-

directed citizens are a threat to old-school power brokers and political potentates. Those kinds of folks depend on opaque systems that befuddle outsiders, and by and large their interest isn't in any particular policy or outcome. They're interested in power for its own sake. The successful region can't let the narrow interests of those 20th century power brokers override its broad interest in 21st century transparency and participation.

Put another way, the successful region has to let itself be shaped by the people who live in it. If not, everyone who can leave, will leave. The capacity to use information simply cannot be stopped, and people will choose to live in places where they can use what they know.

THREE: CONNECT GLOBALLY, BUT DON'T DISCONNECT LOCALLY

Sociologist Manuel Castells has identified a paradox of the information age: as flows of capital, information, and people increase, the poorest segments of a society can become more, not less marginalized.

This is as big a potential problem in the US as it is in India or China. My daughter who just graduated from college has more in common with a recent college graduate from Moscow or Beijing than she does with most kids in North Philadelphia. And the same is increasingly true for her counterparts around the world.

As we spend more time in cyberspace or networking with people who share our level of education and access to certain global systems and symbols, the chances grow that we'll lose touch with the people in our own communities who don't share those levels of education or global network access. The divide of class, geography, and race has always been significant, but it could become even more so if we are not careful to prevent these separations.

The same forces that create global interaction among people and cultures can sort people by class and capacity even more efficiently than in earlier periods. And if this local disconnectedness overwhelms a region – if social integration is omitted from the regional agenda – then the potential for local

economic success is ultimately limited. It is simply too costly over the long term to cede large segments of the population and large sectors of the region from productive participation and use.

While some of this cannot be attended to on a regional basis, there are significant opportunities to ameliorate the problem regionally in everything from how we manage schools to where we build affordable housing and how we design public space.

FOUR: "QUALITY OF LIFE" REDEFINED

I think we're seeing a very significant change in the way people define and seek "quality of life." It's not just that they want more stuff; they want better stuff that will allow them to live healthier and more engaged lives. What I see is a growing interest in expanding what some refer to as "human capability." Economists like Amartya Sen or philosophers like Martha Nussbaum are using this term to refer to the positive freedoms that must exist if citizens are to engage, create, and prosper, not only as economic actors but as seekers of meaningful relationships and functional communities.

Over the last several years, I've seen the value people are placing on expanded human capabilities firsthand as I've worked to improve local fresh food access in urban neighborhoods. Having high quality, fresh food choices in low income communities has

always been an important economic development issue; it speaks to questions of equity (in price and variety) as well as jobs and real estate value. But I underestimated the growing cultural importance of fresh and local foods. This is no longer a movement based on educated elites and do-gooders; it is widespread and genuine.

As the urban food conversation expands, people are asking themselves about more than just the food on their plate in terms of cost and access. They start to ask, what's the nature of this item or product? How does it affect our environment? How does it affect the capabilities of the people who make it or eat it? People are starting to wonder if the hyper-industrialization of the food industry has pushed us backwards in terms of health and environmental quality. When they start taking canning classes, creating vegetable gardens, and buying from local farmers' markets, they're motivated by a desire to restore skills and values that have been nearly lost in a mass consumer age.

At a very practical level, there is a growing demand for changes in the quality of goods – both public and private – in order that they might lead to higher levels of individual capability. The successful region will accommodate that demand by removing avoidable barriers to their achievement, including the citizen involvement that makes it happen. 🌀

Rick Bluhm: The Future of Play

Adapted from a presentation to the Greater Philadelphia Leadership Exchange, September 10, 2009



If you want to understand the future of play, start by looking at two things: movies and video games.

Movie ticket sales have been sinking steadily since the middle of this decade. Video game sales have exploded. More than 100 million Americans are playing video games on a regular basis, and the most popular system – the Nintendo Wii, with its unique motion-sensitive controller – is the most interactive.

These trends reflect a broad shift in the market for entertainment. People want to create their own experiences. They don't just want to watch a story, they want to be involved in that story, and they want to get involved at the time and in the place of their choosing. Those of us who want to get people out of the house to play have to learn how to provide a new level of interactivity and sensory stimulation.

That's why no one should be

surprised at Hollywood's new infatuation with 3-D films. Ten have come out this year already, with another 24 slated for release in 2010. Theater owners are upgrading everything from audio and video to seating and food, all to lure people away from home cable systems offering hundreds of films and shows on demand. But no matter how comfortable or stimulating a theater experience may be, it's still passive, not interactive.

By comparison, consider the growth of the multi-player online games like World of Warcraft. These are fully interactive social experiences in which players not only direct their own characters but also cooperate with other players. More than ten million people spend an average of twenty hours a week playing these games, at a cost of \$10 or \$15 a month, for a total annual domestic take of \$1.4 billion. The cable internet subscriptions needed to make these games go are rising by 14 percent a year.

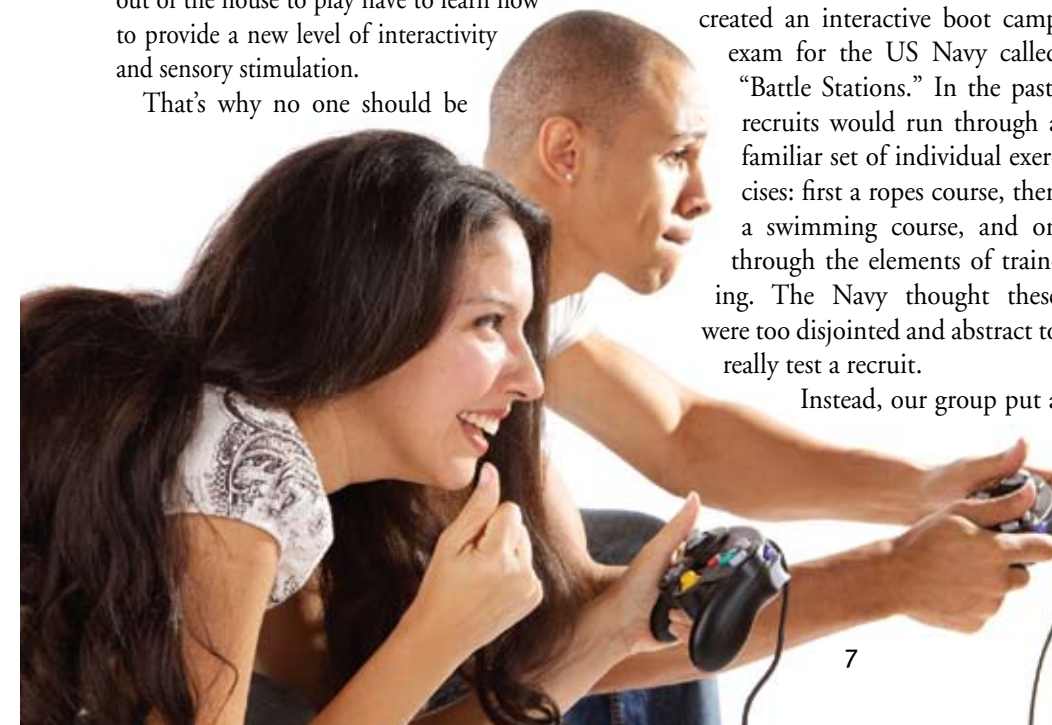
So the shift is profound. But it's also exciting. I was recently part of a group that created an interactive boot camp exam for the US Navy called "Battle Stations." In the past, recruits would run through a familiar set of individual exercises: first a ropes course, then a swimming course, and on through the elements of training. The Navy thought these were too disjointed and abstract to really test a recruit.

Instead, our group put a

210-foot mock warship in a 90,000 gallon water tank and programmed it with interactive scenarios that test everything from physical strength to decision-making within the framework of a compelling 12-hour story. As alarm horns blare and intercoms bark, recruits must move ammunition out of flooded magazines, rescue comrades after a simulated missile attack, and escape a fire through a smoky passageway. We use lights, sounds, and even the smells of salt water and diesel fuel to create a realistic environment that's highly emotionally charged. The recruits not only make decisions under pressure, but they see the consequences.

This is the kind of interactivity we're embracing at the Franklin Institute. We're creating a new electricity exhibit that includes a "sustainable" dance floor that harnesses the energy of the dancers. The floor's moving tiles generate electricity when stepped on: at first that energy lights the tiles themselves, and if enough is produced, that sets off a giant Tesla coil above the dancers' heads. It's a full-body experience where action leads to consequences. We're also working on a new exhibit about the brain and will use the latest technologies, in the most creative way, to create breakthrough experiences to tell this story.

That's the future of play – interactive, original, emotionally engaging situations that are built around powerful storytelling. The more senses involved, the more decisions there are to be made, the more deeply you can draw the participants into the world of the game, the better. And perhaps most importantly, the successful "play" experience has to be unique. To convince someone to get up from the couch and head out into the world, you have to give them something they can't get at home. 🌀



Charlie Grantham: The Future of Work

Adapted from a presentation to the Greater Philadelphia Leadership Exchange, September 10, 2009



When it comes to the thing we call “work,” somebody’s reached down from the sky and hit the reset button. We’re terribly uncertain about the future of work. No one is very comfortable. Even the terms “worker” and “employer” aren’t necessarily useful anymore.

But as someone who’s studied workplace shifts for two decades, I can say this for certain: the future of work will be more about agility than stability. People in the business community hate to hear me say that, of course. They like stability. But that’s not where things are headed. Instead, we’re looking at whole new set of forces that are changing the way we do business.

TECHNOLOGY IS THE DRIVER

Technology is everywhere, and there’s only more to come. For twelve bucks, you can now check your email from an airplane. Meanwhile, the federal government is about to spend more than seven billion dollars to expand rural broadband access, as a vehicle to foster economic development. Technology is the driving force behind growth, and the regions that take advantage of that are going to be successful.

CONSIDER THE FUTURE OF HEALTH CARE

No matter what kind of new systems emerge from the current reform efforts, they’ll be driven by technology. Anyone who’s looking for a sector to invest in should be thinking about health care data management. We’ll need a lot of it, and someone has to provide it.

TECHNOLOGY GROWTH ALSO MEANS THAT THE WORKFORCE IS NO LONGER GEOGRAPHICALLY RESTRICTED

This country is home to an ever-growing number of what we call “location neutral workers.” In many cases, anybody can be anyplace and do the work that needs to be done. The successful regions and businesses will be moving bits, not butts.

ENVIRONMENTAL IMPACT NOW PART OF BOTTOM LINE

Soon every industry will have to consider environmental impact in its bottom line. California is already developing laws requiring businesses to measure their environmental footprints, from the efficiency of their buildings to the commute times of their workers. Companies that exceed certain limits will be sending a check to the governor.

THE TALENT GAP IS GROWING

It’s my prediction that within five years, this nation will be ten million bodies short of what it needs for a sustainable knowledge economy. Companies will either connect to the talent they need, or they’ll move. The successful region will figure out how to provide that talent.

How we do that isn’t yet clear, but we have a set of options. Many baby boomers will put off retirement and find jobs in that gap. But we may have to learn to reach beyond our borders, too. Did you know that Mexico produces about four times as many engineering graduates each year as the western regions of the US? With immigration such a contentious issue, we can’t always bring foreign workers here. But maybe instead of moving the bodies, we’ll be using technology to send the work to them.

FREE AGENTS ARE THE FUTURE

My prediction is that free agents will represent forty percent of the labor market within three years. In the west, the number of new small businesses has quadrupled in the last



five years. Of the 200,000 people in Arizona who’ve been laid off in the last three months, 63,000 have started new businesses.

What’s still emerging is the exact nature of the relationship between these free agents and their clients and employers. We’re reshaping the way we think about delivering health care, retirement benefits, and all the other things that went along with our old worker-employer model. We know the old system won’t be dominant anymore, but we don’t know what will replace it.

What we know for sure is that the region that thrives will be the region that can attract and retain these free agents. That’s the future of economic development. The old model of attracting companies with tax breaks and free land is over. Companies will find a way to bring the work to wherever the talented people are.

So we see all this uncertainty, and all these new trends. But when it comes to the actual nature of the work that needs to get done, where’s the growth potential?

In Greater Philadelphia, I think it’s pretty clearly in education, health care, and environmental management. You don’t have to do it all here. You can become a hub. You can work on distance education with content created here that is distributed by technology. You can focus on developing the systems we’ll need to measure environmental impacts. You can focus on data management for health care systems.

You can think about how to serve those free agents we’ve already talked about, whether they’re older workers looking for second careers, young people just starting out, or entrepreneurs. There’s a growth industry in supporting that part of the workforce. They’ll need education and health care services, and they’ll need places to live that offer the lifestyle they’d like to enjoy. Those free agents are the key. If you can get them here, the jobs will follow.



SPOT THE

and other exercises in organizational survival



You wouldn't think it would be easy to hide a gorilla in a 24-second video. But it is. Standing in front of a room full of Leadership Exchange participants, Roch Parayre made the gorilla disappear with a simple request: count the basketballs.

"There are six kids in this video," he tells the group. "Three wearing white shirts, three wearing black shirts. What I want you guys to do is count how many times a kid wearing a white shirt passes the basketball to another kid in a white shirt. They're moving around, so keep an eye on them."

The video begins. On a signal, the six young people on the screen begin

running in circles around each other, tossing basketballs back and forth. They move quickly and pass frequently, making it tricky but not impossible to count the white-to-white passes.

When the video finishes, Parayre asks for a show of hands: How many counted thirteen passes? Fourteen? Fifteen?

Hands shoot up for all three numbers. "The answer's fourteen," says Parayre. "But that was not the purpose of the ex-

ercise. Did you notice anything goofy? Who saw a gorilla?"

No one answers. Parayre smiles and replays the video. The audience watches silently. Sure enough, while the kids are passing and circling, a person in a gorilla suit enters the frame from stage right and walks calmly through the swirling group. When the gorilla reaches the middle of the screen, it stops and waves at the camera. Then it turns and continues on its way through the passing basketballs.

Disbelieving laughter fills the room: how could anyone possibly have missed this ridiculous gorilla? Was it a trick? "I swear to you, it's the same video!" says a smiling Parayre. Only about one viewer in ten spots the gorilla the first time, he says. "We use this to show that we all see what we're prepared to see. The price of focus is we lose peripheral vision."

THE PARADOX: SUCCESS LEADS TO FAILURE

Roch Parayre is a consultant with Decision Strategies International, specializing in a style of scenario planning designed to help organizations predict and adjust to external change. His gorilla video illustrates a paradox that he says often dooms organizations: if they focus too much on implementing the well-known strategies that initially brought them success, they don't notice (or can't react to) changes that render those strategies obsolete. They don't spend enough time looking for gorillas. It's true for companies, says Parayre, and it's true for regions like Greater Philadelphia.

The price of missing the gorilla can be high. The most egregious example, Parayre says, is that of what was once the largest corporation in human history: General Motors. By 1968, after fifty years of growth, GM was a seemingly in-

vulnerable behemoth, controlling almost half of the North American car market. By 1973, its death spiral had begun, triggered by the OPEC oil embargo and the booming popularity of quality imports. "In economic terms," says Parayre, "that's overnight."

What happened? Put bluntly, the gorilla not only showed up, it ate GM's lunch. As the company crumbled, Parayre says, a series of interviews with retired executives revealed a set of fundamentally flawed strategic assumptions that blinded GM to major external changes:

- *Gas will always be cheap and plentiful.*
- *Americans will never buy imports in significant numbers.*
- *Customers will trade up for new models frequently and consistently.*
- *Unions and government are adversaries, not partners.*

Looking back, the weak points in those deeply ingrained assumptions are clear. But GM was unable to escape them, in part because they were unstated. "These were discovered in hindsight; they never put them on the table in the boardroom as they were making decisions," says Parayre. "And you can never let go of assumptions you don't realize you're making. They couldn't reinvent themselves. Old mental models die hard, and the more successful the model has been, the harder it is to let it go."

Indeed, seen through Parayre's eyes, the economic landscape is littered with gorilla damage. In 1910, America's biggest companies included Standard Oil, Armour & Company meatpackers, American Tobacco, and Anaconda Mining. By 1950, only Standard Oil remained on the list. "The others were gobbled up, leapfrogged, or died a natu-

G RILLA

An Afternoon with Scenario Planner Roch Parayre

ral death," Parayre says. "These are the Googles, Wal-Marts, and General Electrics of their era. I'm sure each one has its own sad story written up in a Harvard Business School analysis somewhere. But if you zoom up to 30,000 feet, you'll see the basic answer is that the world changed, and they didn't."

Parayre goes on to list the long list of factors that make it easy for even the most successful organizations to miss the gorillas. Chief among them is inertia: companies develop procedures, products, and infrastructure that are hard to change. Then there's simple human nature: people often stick with what they know brought success in the past, even if it becomes obsolete. "The leaders of today are really good at solving the problems of yesterday. That's why they got to be leaders," Parayre says. "That's not an accusation – that's an axiom."

SUCCESS STORIES: EXPERIMENTAL CONSERVATIVES

If failure to adjust to change is a rule, successful transitions through generations of change become that much more instructive. A recent study of the world's most successful, long-lived companies – some 27 companies averaging over 300 years in business – revealed a consistent set of strategies:

- *They're all financially conservative, carrying minimal debt and not getting over-leveraged;*
- *They use clearly stated values and missions to guide their strategic decisions;*
- *They excel at seeing around the proverbial corner, experimenting at the margins of their markets and spotting trends and opportunities before they become threats.*

One of the best examples of this kind of long-term success, says Parayre, is right up the turnpike in New Jersey: Johnson & Johnson. Walk into the corporate headquarters, and the first thing you'll see is the company "Credo" which states that its "first responsibility" is to the doctors, nurses, and patients who use its products. To best serve them, the company pledges to innovate, support its employees and its community, and provide a fair profit to dealers, distributors, and shareholders alike.

"It's motherhood and apple pie stuff," Parayre says, "but everybody at J&J is flat-out religious about the Credo. They turn to it anytime there's a major decision. Twenty percent of your bonus at the end of the year is, how Credo-like was your performance?"

Johnson & Johnson, in other words, knows what it's about and consistently develops new products that serve a long-standing mission while maintaining the quality and affordability that has built deep customer loyalty. A related lesson comes from the consumer product giant, Procter & Gamble. Each year, P&G launches more than 6,000 new products in small markets with the expectation that only about 60 will succeed. That's just a one percent success rate. But those successes tell P&G everything it wants

to know about changing customer tastes, and it uses what it learns to update its core brands: new fragrances for Tide, new elastic for Pampers, new flavors for Scope.

Both companies manage to spot the gorillas that lurk at the margins of their markets without losing count of the balls that sustain their operations. They take care of their core businesses while carefully experimenting with new products, anticipating changing customer tastes and needs – that is, changing scenarios – and investing accordingly. "It's like Darwin said, it's not the strongest or the most intelligent of the species that survive, it's the ones most responsive to change," says Parayre. "He said it in the context of living things, but it's not a stretch to extend it to organizations."

REGIONAL LESSONS: FROM THE CARIBBEAN TO THE DELAWARE

How does this kind of thinking apply to a region like Greater Philadelphia? For a clue, Parayre says, look to the sunny island of Aruba, a former Dutch colony just north of Venezuela. The island's leaders recently hired Parayre and his team to help explore the possible scenarios they'll face in the decades to come. "Right now they're living off tourism," he says. "But that dog might not hunt much longer."

The question for Aruba is not just whether or not tourism will sustain a local economy; it's whether that will be the kind of economy Arubans want. Can tourism provide the kind of jobs and opportunity needed to keep young Arubans on the island? Or does another scenario offer something better? Parayre and his team helped the island's leaders explore the variables they control, the variables they don't control, and the possible fu-



ture scenarios that the island could face. Aruba could be:

- A “dependent island” that continues to rely on tourism;
- A “progressive society” with a diverse economy;
- A blend of the two, making “steady progress” away from economic dependence.

What Aruba’s leaders must now decide is how to invest in order to have the best chance of realizing their preferred scenario. They don’t control the global



economy, but they do control many decisions about education, infrastructure, international relations, and economic development. Parayre and his team did not tell Arubans how to spend their time, money, or energy. But the island’s leaders now have a framework to help them make their resource decisions.

Greater Philadelphia could go through the same process, Parayre says. He asks the audience to name the implicit and explicit assumptions this region’s leaders make when thinking about its economic future. The list grows quickly to include:

- Education and health care will drive the region’s economy;
- Most of the people we educate will leave;
- Tax incentives are needed to attract new companies;
- We will always have a talented workforce;
- We can thrive despite mediocre government and leadership;
- The city and the suburbs will compete more than collaborate.

How does this list compare to the one that killed General Motors? It doesn’t take much to imagine the forces that could undermine Greater Philadelphia’s assumptions. Rising tuition costs could end the region’s competitive advantage in education; workforce access could replace tax benefits as a major draw for companies; growth in knowledge industries and increased interest in urban living could help the region retain the people it educates.

Any of these futures are possible. The question that faces Greater Philadelphia is how to prioritize and invest in order to realize the best outcomes in the face of inevitable change. For example, online degrees and distance learning used to be out there on the periphery of higher education – less prestigious schools with students far from the mainstream. A “college education” was synonymous with a four-year, campus experience. Now? A combination of factors, with technological advances and tuition affordability beating the path, are mainstreaming alternatives to this model. To remain on top, our region – which is heavily invested in place-based education – should not only be adapting but also looking out for the next innovations and considering how they might strengthen our position and work in concert with present assets.



MAKING DECISIONS: THINK 1492

At the end of every scenario planning process comes the moment of truth: someone has to decide how to spend the organization’s limited resources. No one has enough to invest in every scenario.

Imagine, Parayre says, that you’re Christopher Columbus. You’re about to sail off into a fog from which no one has ever returned. You’ve done your scenario analysis, and you’ve concluded that you’re

just as likely to find yourself in an arctic environment as a tropical one. Now it’s time to pack the ship. How do you do it so that your expedition can succeed in both scenarios?

Start, says Parayre, with “no regret” investments like food and water which are valuable in either situation. “In a world of uncertainty, let the big checks go to the things that you need regardless of which future works out,” he says. Next on the list are “flexibly deployable” investments: blankets, for example, can keep you warm in the cold, or provide shelter from the heat. But think carefully about what Parayre calls “fragile” investments – things that are only useful in one scenario.

If a small investment (like packing a store of vegetable seeds along with the hardtack and biscuits) provides a big potential return (the crew survives being stranded in a warm place), then by



all means make it. “For those things that might be needed, make a micro-investment and monitor the heck out of the external environment so that if you need to, you can pull the trigger quickly,” says Parayre. Make enough of those small investments, he says, and you’ll be in good shape for any number of scenarios.

All this brings us back to the gorilla video. The first and most important small investment any organization should make, Parayre says, is in “gorilla scanning time.” Don’t be like General Motors and spend all your time counting balls. Be like Sony, or Procter & Gamble, or Johnson & Johnson, and make time to watch the edges of the screen. That’s where the threats are, and that’s where the opportunities are. “Normal times bring normal opportunities,” Parayre says. “Significantly superior opportunities come in times of disruption – but only if you’re ready.”

Rick Bluhm

Director of Experience Design
The Franklin Institute

Bluhm leads the team of Exhibit Developers and Exhibit, Prototype, and Graphic Designers in the creation of ongoing themed interactive exhibitions at The Franklin Institute. This work draws upon his extensive



experience as creative director with companies like Universal Studios, Thinkwell Design, Bob Weis Design Island, and BRC Imagination Arts, where he has produced Themed Entertainment Award winning experiences over the past ten years. These projects involved immersing guests in experiences that stimulate all the senses using the latest technology in scenery, lighting, audio-visual media, and special effects. His earlier career encompassed theatrical scenic design, design, and production of special events and art direction for television and film. Bluhm is the recipient of numerous awards, including an Emmy for Outstanding Art Direction and Scenic Design.

Charles Grantham

Principal & Co-Founder
Work Design Collaborative

Grantham has spent more than 25 years studying and writing about the future of work. He is also the founder and chief scientist of the Institute for the Study of Distributed Work, based in Prescott, Arizona, where he



manages an extensive applied

research program focused on the emergence of the electronic workplace. He is recognized as an international expert on the design of information and organizational systems that support these new forms of work. Grantham received his doctorate in sociology from the University of Maryland. He has published six books and more than two dozen technical papers. His latest book, Corporate Agility, published by the American Management Association, examines how to integrate the management of technology, human resources, and corporate real estate assets.

Jeremy Nowak

President
The Reinvestment Fund

The Reinvestment Fund (TRF) has invested \$1 billion in housing, community arts centers, schools,



commercial real estate, and sustainable energy projects. TRF’s recent

ventures include policymap.com, a national mapping tool; the Fresh Food Financing Initiative, a successful effort to bring quality food retailers to underserved communities; and TRF Development Partners, a real estate venture rebuilding one of Baltimore’s most distressed communities. Nowak is a member of the board of The Philadelphia Federal Reserve Bank and chairs the board of Mastery Charter School Foundation. Recent publications by Nowak include an examination of policy options for distressed cities and the role of art and culture in neighborhood regeneration.

He was a Fellow at the Aspen Institute in a program for entrepreneurial leaders in education and is a member of the Harvard Kennedy School executive session on cities and social enterprise. He holds a doctorate in cultural anthropology from The New School for Social Research.

Roch Parayre

Senior Partner
Decision Strategies International

Roch Parayre is an expert in the areas of scenario planning, decision analysis, the psychology of decision making, and creativity and innovation. He is also a senior fellow in the Mack Center for Technological Innovation at the Wharton School. He teaches executives at Wharton and also at CEDEP and the Institute for Management Studies. He has consulted and given executive education seminars on the topics of decision-making, scenario planning, creativity, and strategy. He holds a PhD in business strategy from the University of British Columbia, a master’s degree in engineering-economic systems from Stanford, and an undergraduate degree in operations research



and mathematics magna cum laude from the University of Ottawa.

Saskia Sassen

Robert S. Lynd Professor of
Sociology, Columbia University

Sassen is an internationally renowned sociologist and economist, noted for her analyses of globalization and international human migration. She is a member of the Columbia University Committee on Global Thought and is the Centennial Visiting Professor at the London School of Economics. She holds a PhD in sociology and economics from the University of Notre Dame and



completed post-doctoral studies at the Université de Poitiers and the

Center for International Affairs at Harvard University. Her most recent book is Territory, Authority, Rights: From Medieval to Global Assemblages. She is the author of Cities in a World Economy (3/E), The Global City, and co-editor of Digital Formations: New Architectures for Global Order. She is a member of the Council on Foreign Relations, the National Academy of Sciences Panel on Cities, and was chair of the Information Technology and International Cooperation Committee of the Social Science Research Council.



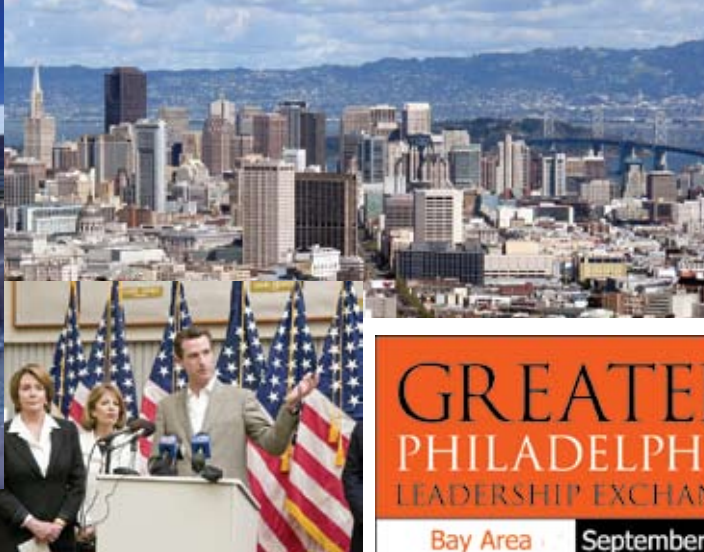
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Applications for individual participation will be available online on February 1, 2010. In the interim, you can read about past visits to Chicago and Atlanta at www.EconomyLeague.org.

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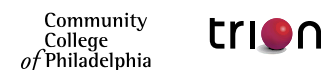
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T. 215.875.1000
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