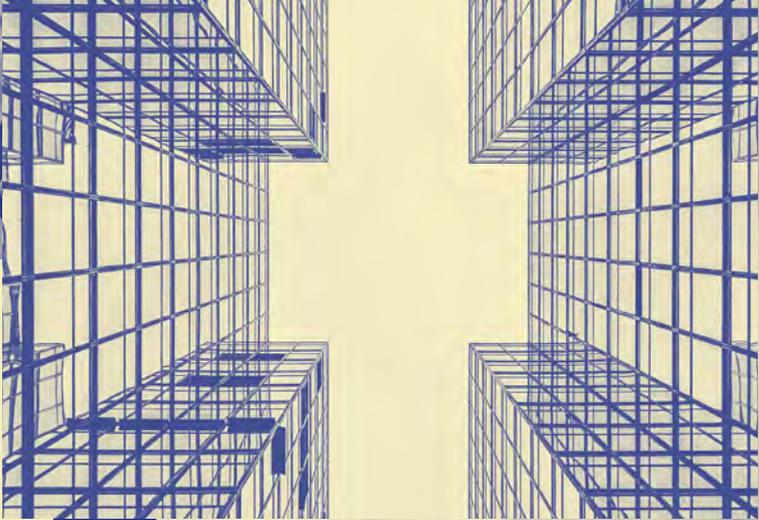
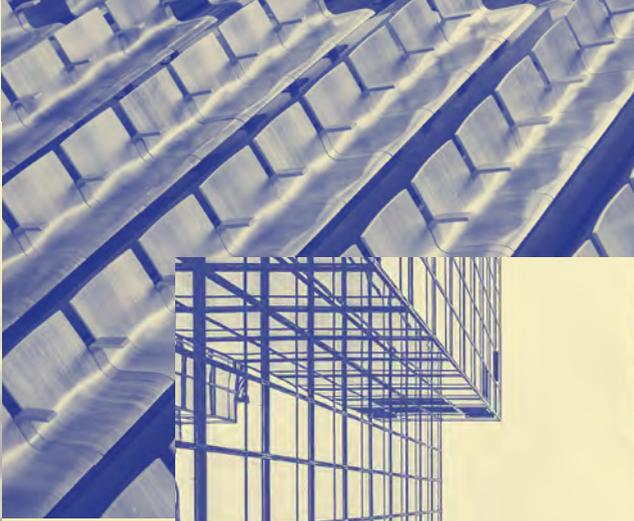


The Future of Congresses

The Copenhagen Scenario Model



**Scenarios for the future
of congresses 2040**
Fortifying impact



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Foreword

The world is changing, and it is changing fast. That is a cliché but also the truth. Megatrends such as technological development raise the question of the future of work, while a rising Africa and a growing Asia will on their own change the world as we know it today. Climate change is redefining the anthropocene with many likely consequences to the world, entailing a rising awareness of our obligation to do our part to reach the UN's sustainable development goals by 2030. Add to that many other game changers, including a growing number of business trends, in the years to come.

Associations, destinations - the global meeting industry as a whole - also face these challenges. Truth be told, we have little tradition for fast change in the industry. That leaves us with a lot of questions, uncertainties and a dire need to direct ourselves to become future-ready, starting today.

Copenhagen CVB and BestCities have throughout 2019 conducted an in-depth piece of future research in a unique collaboration with future scientists and designers. The result is four probable scenarios for 2040 that spell out potential futures for our industry. These scenarios can be used for back tracking to today's reality, exploring opportunities and strategizing for the future.

We are proud to present the scenarios to all of you in the form of both this white paper and via the online tool available here:

copenhagencvb.com
bestcities.net/resources-learning

We would like to extend our sincere thank you to the Danish Design Centre and Public Futures, and not least to all the great and inspirational industry people, that helped us infuse this study with knowledge and experience either through interviews, participation in workshops or reading along with comments and suggestions. This work is an outcome of a truly co-creative process globally. We aspire to make this work the stepping stone for our industry to move forward on a qualified basis of knowledge, to secure the continued positive impact on the world that we live in, on all bottom lines.

We hope you will enjoy the read and look forward to continued conversations on the journey towards 2040.

Kat Lykkehoff

Kat Lykkehoff
 Director of Convention
 Wonderful Copenhagen

Intro

People have always travelled to meet and congregate. For commerce, for deliberations and governing, for celebrations, for socializing, for networking. It is in human cultures at all times and everywhere, indeed it is in human nature. Meeting with others in organized ways is quite simply relevant, useful, and meaningful to us as humans.

When we trade more, travel more, communicate more, and network more, we also meet more. The association meetings industry has clearly benefited. For decades, the association meetings industry has seen high growth driven by underlying megatrends of economic growth and transformation, the move towards a knowledge economy, technology, and globalization. There is little doubt that these megatrends will continue.

Challenges and opportunities for congresses of the future

What is less certain is whether in the decades ahead they will continue to favor an industry and a fundamental concept which – in the words of one industry expert, we interviewed – has remained essentially unchanged for a hundred years, as the market has kept widening.

BestCities has put the future of the industry on the agenda and will launch a wider debate on the upcoming Global Forum in Copenhagen in the form of four scenarios. These will help define the future opportunity space, align and promote strategic thinking and agenda-setting in the industry.

One important issue is how to create awareness about the impact that associations meetings have beyond tourism. It is increasingly acknowledged that the impact is much more than the direct tourism-related revenue meetings generate, highly significant as they are. But fortifying this impact depends on even greater awareness of the value in creating and sharing knowledge. Value that results from connections and networks established, from challenges solved, and ideas sparked by minds coming together on congresses and meetings.

At the same time there is a number of transformative challenges ahead. Technological change, economic change, social change and global change.

The technological potential for substituting the meetings concept will only grow. Digital communication is progressively becoming cheaper, more convenient, and more “real” in its ability to transmit human communication and interaction.

Compare this to the cost and inconvenience of physically bringing large numbers of geographically dispersed people together in one location for a given period of time. And such costs may very well increase as the climate change agenda needs to be addressed, while investment in transport, venue and hotel capacity may well run into diminishing returns. Political initiatives like the UN’s Sustainable Development Goals – aimed at 2030 – the Paris Agreement, government policies and grassroots activism, not to mention more frequent extreme weather occurren-

ces, will ensure these issues remain top of agenda and top of mind.

A crucial driving force is structural change to the economy, jobs, and careers. The coming wave of artificial intelligence, robots and automation point to large transformations in the roles of humans in the economic process. This could mean everything from the obsolescence of traditional professional skills to a much more fragmented labor market with many looser forms of employment.

Such developments will transform the requirements and demands of professionals, who constitute the base of associations and thus the attendees of their congresses and meetings.

Indeed, associations may themselves face challenges to their model as a result of all this. A stronger trend towards more individualistic, diverse and fleeting orientations could put pressure on traditional professional and association structures.

Changing family patterns, gender roles, and women’s advance in the professions also represent structural changes in conditions for associations and their meetings.

The global economic shift to Asia and the emerging markets of Africa and Latin America adds to a picture in which challenges to the classic model of association meetings come from many new directions.

How to respond: A strategic conversation

The challenges are uncertain, but it makes a lot of sense to reflect strategically on how to respond. There are two main ways of doing this. One is to be ready to tackle the changing conditions as they occur – to be agile, to be resilient, or, as Darwin called it, to be adaptable to change.

The other is to be a change maker. To be a force for change yourself, rather than simply adapt to changes coming from elsewhere and thus become part of someone else's strategy. To define and pursue a visionary agenda for congresses in the future. To fortify your impact.

Regardless of which type of response is preferred, it is important that it is done with open eyes. It is essential that there be a strategic conversation which clearly shape a common understanding of the challenges and opportunities, of the changes we face, and of innovative ideas for action.

Scenarios is a highly effective way of creating such a strategic conversation, which is why we have developed the four scenarios presented in this report. They represent alternative possible futures which could all become reality by 2040.

The scenarios are described in words in this paper, and they were developed into tangible, visible, and audible experiences for participants at the BestCities Global Forum in Copenhagen.



Approach & process

The scenarios result from a process that is defined by its time horizon, its use of methods from futures studies, and a collaboration between futurists and designers.

Time horizon – 2040 starting today

What is the strategic time horizon for the association meetings industry? The planning horizon alone is often long, since association meetings have long lead times. They rotate on a regular annual, biannual basis, in some cases even longer, and bidding for upcoming meetings starts years ahead. Often, convention bureaus even prepare for future bids further ahead from the upcoming one. Investment in venue and accommodation similarly have long time horizons. Hence, strategic decisions will often concern and impact the situation well more than a decade ahead. 2040 may seem distant, but it is already nearing the planning horizon. At the same time, it is sufficiently untied by decisions and commitments already made that we have an attractive future space with lots of room for maneuvering at our disposal. A great tool for inspiration and debate.

Foresight, scenarios & backcasting

In the process we apply two general methods for working with the future: foresight and backcasting. Foresight is the process of identifying and projecting past and present trends in

order to gain some delineation of the possible future space. Working with societal megatrends – demography, globalization, long-term projections on the economy, technology, resources, climate, broad social trends – is one part of this. Another part is working with business trends – how has the association meetings industry developed, what are decisive quantitative trends and qualitative developments? There are many sources for such insights. Looking at industry reports is one, talking to experts and insiders in the industry is another. We have applied both.

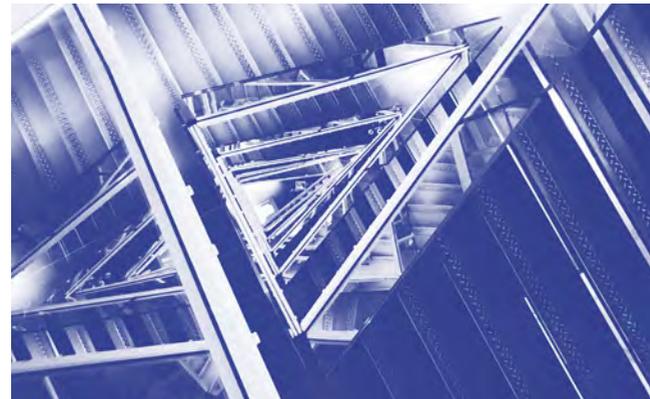
Based on the foresight it is possible to create one or more images of the future. In this project it takes the form of a set of four different scenarios that are rooted in trends identified in the foresight process.

Backcasting is the exercise of asking what we should do today given the future image that our foresight produces. This may include working with the

future – e. g. in the form of scenarios – visioning, i.e. where would like to see ourselves in the future – and discussing which present path we should take. This may be worked out in plans, initiatives, medium- and short-term objectives, areas of responsibility etc.

Futures studies & design methods

Combining futures methods with design methods is a useful and inspirational way of working with the future. Public Futures and the Danish Design Centre are pioneers in this area. It makes for a very involved and engaging process where the future agenda can be a shared and very rewarding experience. It produces a shared understanding of opportunities, challenges and visions conducive to effective strategy making and execution.



Baseline

The scenarios to be presented in this report depict a set of alternative futures. But in order to ensure that they are all plausible and relevant, we need a baseline view of the future: an idea of what the future backdrop will be like if present trends continue. While we cannot predict or forecast this in any detail, we can and must take into account the fact that there are structural driving forces shaping the future we will see – *the megatrends*.

Megatrends are deep-rooted long-term dynamics that have been changing conditions for a long time and will continue to exert their influence in the coming years and decades. The difficulty is not in forecasting them, but in assessing where they will take us, what they will mean and how to navigate them.

Even if they are well-known, being aware of them can be a challenge since they move slowly. But it is essential to take them into account when thinking ahead.

Here we will give a brief outline of two sets of baselines. One for global developments and one for developments in the association meetings industry.

Global baseline: Societal megatrends

The market for association meetings is global, so global developments that affect everything else are naturally of great importance to the conditions that the industry will see in the future. Without going into much detail, here is a selection of headline parameters for the world in 2040:

- The rising South: Global population will increase by 20%, adding more than 1.5bn people. Almost half of this increase will occur in Africa, and most of the rest in Asia excluding China. India's 240m population increase contributes close to half of Asian population growth and will make India the world's most populous country, replacing China.
- The greying rich: Ageing population will be a global phenomenon due to increased longevity and falling birth rates. The number of people over 60 will double from 1bn to 2bn. Africa stands out as the young continent where falling fertility takes place from a significantly higher level.
- The urbanization of life: Migration to cities will mean that the urban population will increase even faster than total population, comprising almost two thirds of the global population in 2040, up from around half in 2019. 90% of this urban increase will occur in Asia and Africa.
- The move east: China will be the world's largest economy. Its share of global GDP will be more than 25%. India will be second, doubling its present share to 16% and overtaking the USA's 15% share. The EU's share will be around 12%.
- The expanding middle class: The present rich OECD economies will still have highest GDP per capita, but China, India and other non-OECD countries will narrow the gap. The global middle class – people who can afford a life with modern conveniences, consumer goods, leisure and travel, education and health – will double.
- The social transformation: All this will mean social transformation. The middle-class lifestyle package will expand globally. This means things like education as norm, female job careers, nuclear families with two children as the norm, material betterment, urbanization, individualization culture – and culture clashes within societies, as traditionalists react to this broad-based social change.
- The Anthropocene: Global warming, resource issues, environment, and biodiversity will be critical challenges on the agenda. This probably applies even in scenarios where the transition to a sustainable economy goes relatively well. We live in the Anthropocene where humans determine the fate of the planet, and we will have to struggle to steer a sustainable course. To the extent

that this will impact global travel and transport, it will also impact the meetings industry.

- Technology transforms everything: Machine intelligence (AI), robots, new materials, biotech, genetic engineering, nanotech, new energy technologies etc. will be developed and diffused into the economy and our everyday lives. They will continue to contribute to the economic development – and to the disruption of well-established companies, jobs, industries and life patterns.
- Generation Z: Every generation is shaped by cultural trends and events taking place in their formative years. Generation Z – broadly defined as the cohort born between 1995 and 2005 – are defined by, among other things, social media and the financial crisis of 2008. This gives them a different outlook and behavior than previous generations. They can be characterized in various ways – a non-drinking, well-educated, non-book-reading, retweeting, Instagram generation is one take. The main thing is that it is important to be aware of changing norms, attitudes and preferences as times and conditions change.
- Changing working conditions and professions: The move towards a different type of economy is a megatrend in itself. In order to have a feeling for how such changes will qualitatively impact business conditions for the associa-

tion meetings industry, we will take a deeper look at this megatrend.

As technical innovation, economic growth and changing social patterns transform the economy, the nature of work and job conditions, too, are transformed. And this very much goes for the broad segment made up by professionals that form the membership of associations, hence attendees of association meetings. We already see a trend towards more frequent professional congresses, partly reflecting the need to keep up with the pace of development.

The big trend is towards a service and knowledge economy. Technology is replacing humans in materialhandling jobs and tasks. Information technology, artificial intelligence and robots will replace humans in many activities, even ones that are being done today by highly educated skilled professionals. Diagnosing patients, devising legal documents, engineering mechanical devices etc.

One concern is that we will see technological unemployment on a hitherto unknown scale. One often cited study says that 47% of today's jobs will be automated. When not only manufacturing workers, sales personnel and drivers, but even doctors, engineers and lawyers are being replaced, what is left? The answer is that in the future we will be employed in developing and directing technology towards human needs. The economy is an increasingly versatile sophisticated machine which can provide an infinite variety of goods. As was the case in historic

rounds of automatization, humans will be shifted into roles that are complementary to technology. In fact, humans are the one factor which makes economic activities valuable at all, i.e. they produce goods and services that are valuable to humans. Therefore, the economy will be about human needs, identifying them and servicing them.

Another concern is how jobs and income will be distributed. In recent decades we have seen a growing inequality within developed countries.

We have also seen a tendency towards more fragmented forms of employment. Freelancers, project workers, Uber drivers, even academics in temporary positions. Precarious work giving rise to the term "the precariat" (playing on the old Marxist term the proletariat).

Such developments create all sorts of tensions and issues on the social and political agendas. Will we see more of this? And will we be able to solve such issues? That is difficult to say, but over the next 20 years we will likely see new types of social innovation and political movements and developments.

Professionals will not be replaced, but their role will change towards ever more human-centered tasks. An example could be a doctor who, instead of diagnosing his patients, is charged with guiding them, advising them, helping them make decisions on procedures, assisting them and their relatives in coping with their situation etc. etc. All this on the basis of professional medical knowledge, but also of human knowledge of the human condition, insight and empathy.

Industry baseline: Business trends

While megatrends are general, business trends are specific to a particular field of interest. In order to create plausible and relevant scenarios, it is useful to take a step closer to the industry we are working with. Here is a look at some trends in the association meetings industry that set the stage for its future development.

Association meetings is a product that serves associations and their members. Associations have many services and activities, but international congresses and meetings are one of the most important. Associations have generally thrived on the back of mass education and the knowledge economy. But they face challenges as well, and they may be entering a new phase, particularly in rich countries.

Associations: Challenges and opportunities

Associations are member-based organizations deeply dependent on engaging and servicing their members on the one hand and the surrounding world in which they operate on the other. They are very different and face different issues. But there is a number of challenges that are quite common:

- Membership, recruitment and retention are constant challenges. There are signs that this task is becoming more difficult. The American Medical Association used to organize 75% of American doctors. Now the number is 15%. The trend

is known in many traditional associations, including trade unions, in developed countries.

- Individualization is one explanation. People – especially younger generations – do not automatically identify with collective organizations. They are more critical and demand value for the money and time they invest.
- More women in professions. A number of traditional associations are historically male-dominated, and the original model is arguably based on members that are full-time career professionals while their spouses tend to family and home.
- More competition. Many associations see their traditional offerings to members – networking, community updating of professional knowledge – being offered from competing sources. Also new approaches and models may arise from emerging countries where professional associations are not as deeply established and set in their ways as in high-income countries.

**Association meetings:
A growth industry – so far**

For a long time, the association meetings industry has seen rapid and steady growth. The most authoritative aggregate data come from the International Congress and Convention Association, ICCA. A headline number is the number of meetings held each year, where meetings are defined as those that take place on a regular basis, rotate between at least three countries, and host at least 50 participants. In 2016 more than 12,000 such meetings were held. This has been doubling every ten years since 1963, posting average annual growth rates of about 8%. Even as meetings have tended to become smaller and shorter, overall growth is still highly robust in terms of total number of participants.

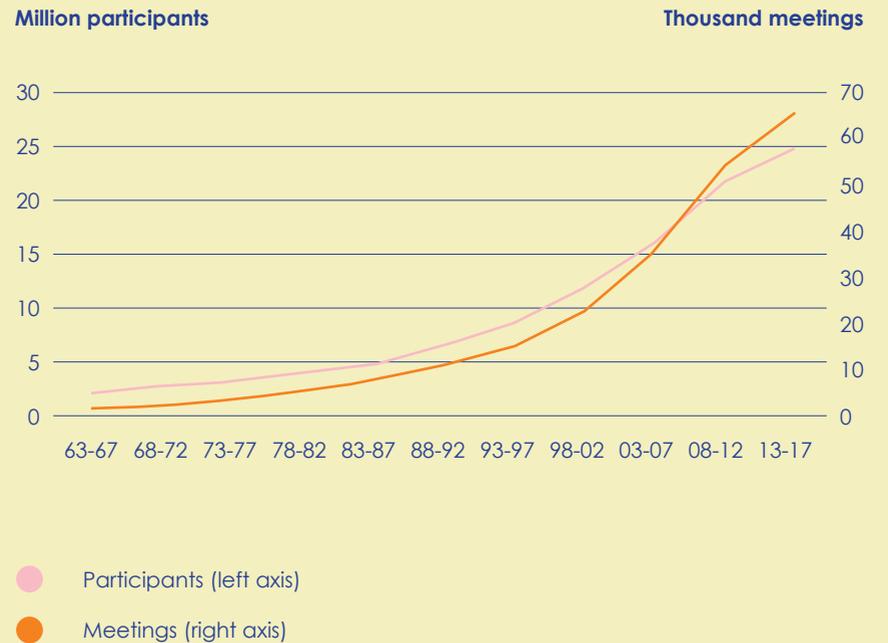
Fig. 1 Number of international association meetings and number of participants

Source: *A modern history of international Association Meetings - Update. ICCA, 2018*

Note: Association meetings registered in the ICCA database. It includes meetings which take place on a regular basis, rotate between a minimum of three countries and host at least 50 participants.

Growth

Association meetings and participants 1963-2017



Since 1993 ICCA has been publishing estimates on total spending per participant, which have also shown an upward trend, possibly increasing by some 70% in real terms over the past 25 years. ICCA's estimate for total revenue from participants in association meetings is well over \$10bn per year in 2013-17. (This number relates to direct delegate spending, i.e. does not include any additional investment from the organizer or secondary economic effects).

So association meetings are big business and growing fast. There are many reasons for this. The industry and the entire ecosystem of association meetings have been successful in their efforts at marketing, promoting, organizing, developing and expanding their services. But the chief underlying reason can be summed up as favorable megatrends, a notably growing global population and economy plus structural transformation. The continuous structural shift to a knowledge-

driven economy based on an expansion of formal education, including professionals and their associations. The continuous globalization, meaning ever closer integration of markets and economic activities into one global economy, supported (at least until recently) by policies and international institutions. The accompanying expansion and improvement of international travel and transport, making travelling progressively more economical and convenient.

Each one of these factors have served as multipliers, creating the wave that the industry has been surfing on.

Three further developments are worth remarking upon.

Firstly, the relative rise of Asia, Latin America (and other emerging markets) and corresponding decline of Europe and North America.

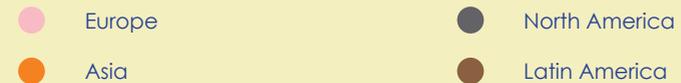
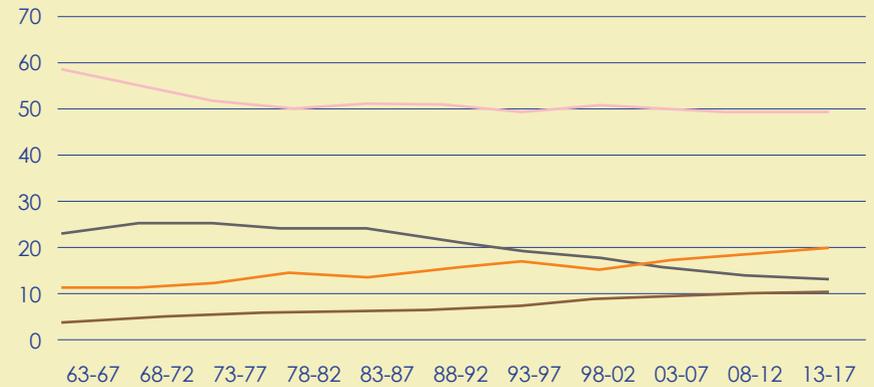
Fig. 2
Development of regional shares

Source: *A modern history of international Association Meetings - Update*. ICCA, 2018

Note: Association meetings registered in the ICCA database. It includes meetings which take place on a regular basis, rotate between a minimum of three countries and host at least 50 participants.

Shares

Percentage of total association meetings by continent 1963-2017



Europe's dominance is due to the region being characterized by many medium-size and small countries whose meetings within the region are counted as international meetings. This accounts for the level of the European share.

Secondly, the relative shares of different professions/subjects of meetings have been remarkably stable. The most significant trend is the relative rise of technology. This has made a dent in the share of medical sciences, which nonetheless continues to be the largest segment.

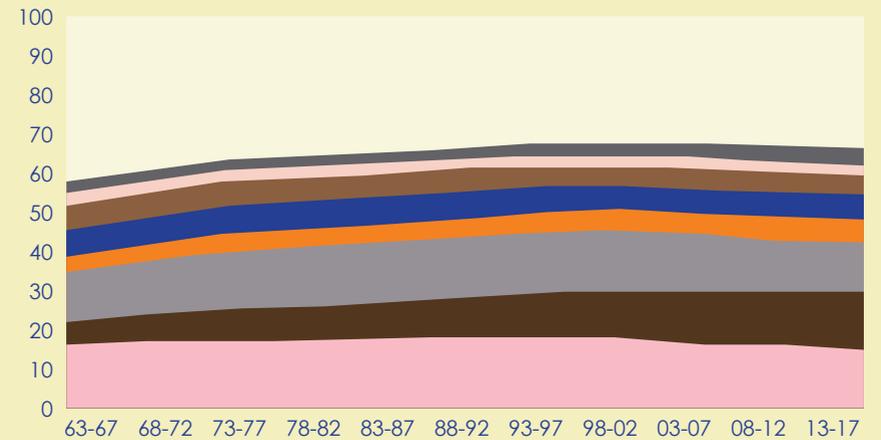
Fig. 3
Meeting subjects, share of total

Source: *A modern history of international Association Meetings - Update*. ICCA, 2018

Note: Association meetings registered in the ICCA database. It includes meetings which take place on a regular basis, rotate between a minimum of three countries and host at least 50 participants.

Subjects

Percentage of total association meetings by subject 1963-2017



- Medical sciences
- Management
- Technology
- Science
- Education
- Industry
- Social sciences
- Economics
- Other

Thirdly, there is a trend towards regionalization in the rotating meetings. Meetings that rotate across continents have shown a marked and steady decline as a share of total meetings. The share of meetings that rotate within regions have gone up.

This regionalization is tied to another trend, namely an increasing frequency of meetings. So, associations which used to have a meeting every three or four years now have meetings on an annual or even semiannual basis. This in turn has to do with the need to keep up with the pace of development within the professional fields. The trends towards shorter and smaller meetings also reflect these developments.

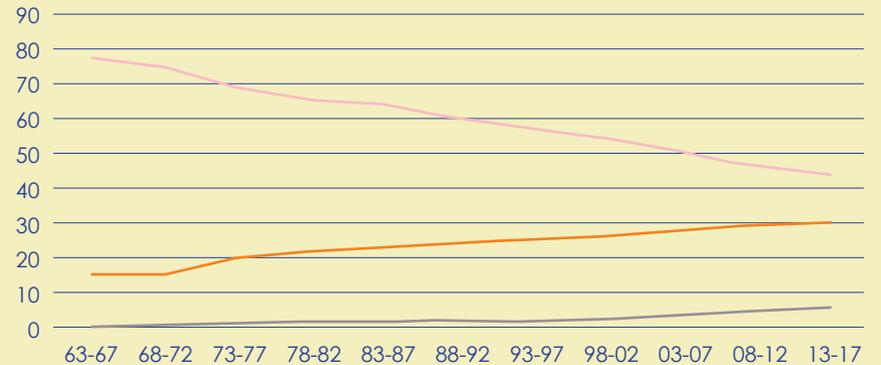
Fig. 4
Rotation of meetings between regions and within regions

Source: *A modern history of international Association Meetings - Update*. ICCA, 2018

Note: Association meetings registered in the ICCA database. It includes meetings which take place on a regular basis, rotate between a minimum of three countries and host at least 50 participants.

Rotation

Top 3 rotation areas' percentage share of total rotating meetings 1963-2017



- World / international
- Europe
- Asia

Motivations and impact

What motivates people and associations to engage in association meetings activities? To associations they are hugely important. Each association meeting “plays a massively significant role in the life of that organization: it is typically the only time when a large proportion of the members of the association physically gather together, the only time when the association attains a concrete form and when its unique culture can be directly experienced”. (ICCA, quoted in Rob Davidson, 2019)

But what is the impact of meetings on attendees? So far, researchers have identified a range of impacts (Hansen & Pedersen, 2018), including the academic impact (Hansen, Pedersen and Foley, forthcoming) and other qualitative effects (Jago, 2017): One report said that the core motives and needs that are addressed by association meetings are: develop and share ideas; educate/inform; promote; network/socialize; change attitudes/behavior; sales and performance.

A survey on qualitative impact of conferences made by Australian researchers (Edwards et al.: *Power of Conferences*, 2017) lists six themes, including personal growth and learning, driving social change, ideas and innovation. They note that conferences play a significant role to attendees as ‘out of the ordinary’ experiences that have a special role in generating new kinds of thinking in the meeting of professionals free from daily routines. They observe that “Conferences facilitate conversations across individuals and groups who may not normally come together. They

provide a temporal and spatial mechanism that reduces physical distance, a barrier to collaboration, enables value co-creation that drives innovation and business transformation, increases sales and networks, and provides local communities with practitioners who have enhanced knowledge and technology for use in their practices.

The difficulty is in quantifying such effects, not least because some will play out over a long time after the meetings and be influenced by a number of other factors. The solution so far has been to acknowledge that the effects are there – and that direct expenditure is merely the tip of the iceberg – but rather than seek to quantify them, try to document them by doing case studies. Thus, the JMIC (Joint Meetings Industry Council) has an ongoing research project collecting such case studies based on an agreed academic framework.

Impact beyond

In the recent decade the wider societal impact of the industry has become a hot issue on the industry’s agenda.

The traditional measure of effect is the total spending from delegates – the aforementioned \$10bn+ per year. This number is of course highly relevant to decisions on investing in marketing, infrastructure, venues etc., not least to destinations that seek financial and political backing for expansion of meetings capacity.

But total spending by delegates does not tell us a lot about the value of



a congress or a meeting. Why do people meet? What comes out of the meetings? What is their true impact, in total? And what does the city or country gain apart from cash revenue? Could meetings be viewed more strategically as a way of generating and supporting industries, knowledge clusters and development in host cities and destinations?

It is understandable that some destinations focus on the “tourist” revenue generated by conferences. But since

they expect in the future to be competing on impact beyond tourism and to consider synergies – in local community engagement as well as to association legacies – they too must reflect on their role in a more strategic light. There is also the issue of negative impact as seen in growing local opposition to tourism in some popular tourist destinations. “Over-tourism” is on the agenda, and the meetings industry needs to take this into account and find ways of addressing it.

Scenarios for the future of congresses

Scenarios for the future of congresses

Creating scenarios for the future is not an exact science and there are many ways to organize their construction. Megatrends and business trends are useful building blocks, but so is creativity as well as common sense. In the futurist's toolbox there are several methods that you can use. We have chosen the scenario matrix method.

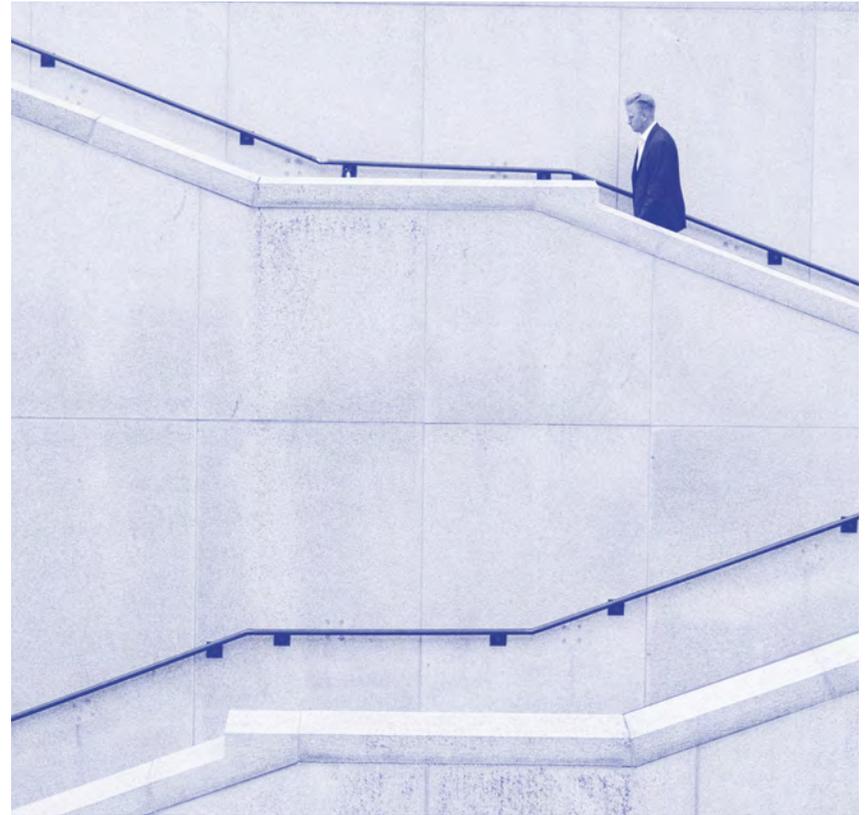
The matrix method

By the matrix method, or 2x2 scenario method, you identify two important dimensions of uncertainty. You represent outcomes on these on a line continuum (or, possibly, in a binary either/or representation). There is one outcome represented at one end of a spectrum and another one at the other. By crossing two such lines orthogonally, you get a two-dimensional grid with four quadrants. Next, you create the scenarios by imagining and describing what the future will look like in each of the quadrants.

The great advantage of this method is that it is a logical framework for plausible scenarios which is transparent and easy to share. This makes it a useful tool for communicating and debating possible futures. Four scenarios are sufficient to create a future space of possibilities while maintaining simplicity, overview and balance.

Scenario dimensions/axes

In defining the two scenario dimensions or axes, the task is to identify decisive



drivers whose direction is uncertain and at the same time are of great importance to the development in the field. There are of course infinitely many possible dimensions, and it can be a useful strategic exercise in itself to reflect on uncertainties and drivers.

Here, we have chosen to focus on a pair of dimensions that can be said to be defining the working space for association meetings. One takes the participant perspective, and one focuses on global conditions. We call them people/participants and societal structure. They represent two essential and uncertain questions to the congress industry of the future: Why will we meet? And: How will we meet?

The two dimensions are briefly described here.

People/participants

Why do people meet? This is the central question on this axis. And since the motivation to meet as professionals varies with how professional conditions develop, these are depicted here. The axis represents a continuum of professional conditions and job perspectives of individual participants in association meetings. Will professions develop in a deepening way, or will they be widened and/or transformed by new conditions?

A deepening of professionalism on one end will represent a continuation of the historical trend towards ever greater

specialization within the professions. It is an academic approach to professionalism built on scientific methods. The one true dynamic factor of production is the effective application and development of solid knowledge. Your career is determined by how deep a specialization you achieve – because that is what defines competitiveness.

At the other end, a transformed professionalism is driven by the emerging new logic in the economy and job market which centers around human needs and cross-professional project work. The economy is undergoing a transformation on a scale comparable to the transition from the industrial economy to the information economy. We are on our way to a qualitatively different society. As many traditional professional functions are being taken over by artificial intelligence, the role of professionals will increasingly center on identifying and servicing individual human needs. An ability to succeed in project-based, human-centered work in ever-changing cross-professional teams will be a valuable professional skills. Also, empathy, human insight, flexibility and communication skills are key.

Societal structures

How will people meet? As a fundamentally global industry, the global development is allimportant to the future of congresses. When structures change, the way people meet will change as well. The structure axis focuses on conditions that define the situation and thus form the general framework for the association meetings industry. Will physical meetings be substituted by technological means? Will

globalization be disrupted by global warming and/or political developments? Will established forms, institutions, companies and organizations be exposed to waves of disruption? The uncertainty that this axis deals with is i.a. the future of globalization in the age of Anthropocene, the economic shift to Asia, and the greying and relative decline of the rich countries.

At one end, we have the outcome where change is sufficiently manageable and/or existing institutions prove sufficiently resilient that they can absorb and adapt to them. Stability, trade, security and predictability are top concerns to all significant actors. There may be different views on policies and institutions, and also other differing interests, but in general the desire for stability prevails and determines the outcome. Institutions and agreements may be changed, but there is still a framework and an ability to reach binding agreements on e.g. global warming, economic and security issues. The world muddles through preserving stability.

At the other end we have a more fragmented picture. Globalization is challenged by regionalization, rivalry and inward orientation. Economic policies, technological systems, infrastructure and culture develop more independently in different parts of the world. The various big powers dominate their respective regions, and shape regional institutions accordingly while global coordination is weakened. Big companies are regularly disrupted. Thus, globalization - in the sense of an ongoing integration into one global

system - is to some extent discontinued. Regionalization is a stronger force. There is little formal coordination, and development can appear chaotic. However, there is also a flourishing of experimentation in economy, technology, business models and social patterns. Multiple approaches in a fragmenting world.

Having thus picked two axes, by crossing them we get a future space with four quadrants, four alternative futures each defined by a distinct combination of people/participants and societal structures – see fig. 6.

Four alternative futures

The scenarios mainly differ from each other by the two dimensions. Other factors, notably megatrends, are present and act in line with the scenario in all of the four different futures. In no scenario is technology less advanced, or insignificant. In no scenario will Asia not have assumed a more significant economic position. And so on. Still, megatrends, e.g. technology, may develop differently depending on which combination of "people/participants" and "societal structures", i.e. which quadrant, we are looking at.

Also, there will be congresses in 2040, and associations, and destinations. They are there in some form in all scenarios presented here. Their disappearance is not unthinkable, but nor sufficiently plausible in light of the fact that the concept has been around

and growing for maybe 100+ years – surviving world wars, cold war, financial crises and more. And also because the desire to meet is a function of human nature and of increased communication, and these are not treated as uncertainties. The important thing about the scenarios is the qualitative differences in the concept of congresses and how this impacts key actors. Yet, there may be a difference in growth rates of the association meetings industry between the scenarios, again, because the market is conditioned differently depending on the outcome of first-order factors "people/participants" and "societal structures".

We stress that what the scenarios are meant to highlight are the qualitative differences between meetings in the alternative futures. Meetings will have different purposes in the four quadrants, and they will have different impacts on associations and destinations. This makes for different strategic issues and agendas.

Scenario matrix

Societal structures ↓
What will characterize the developments in global, societal structures?

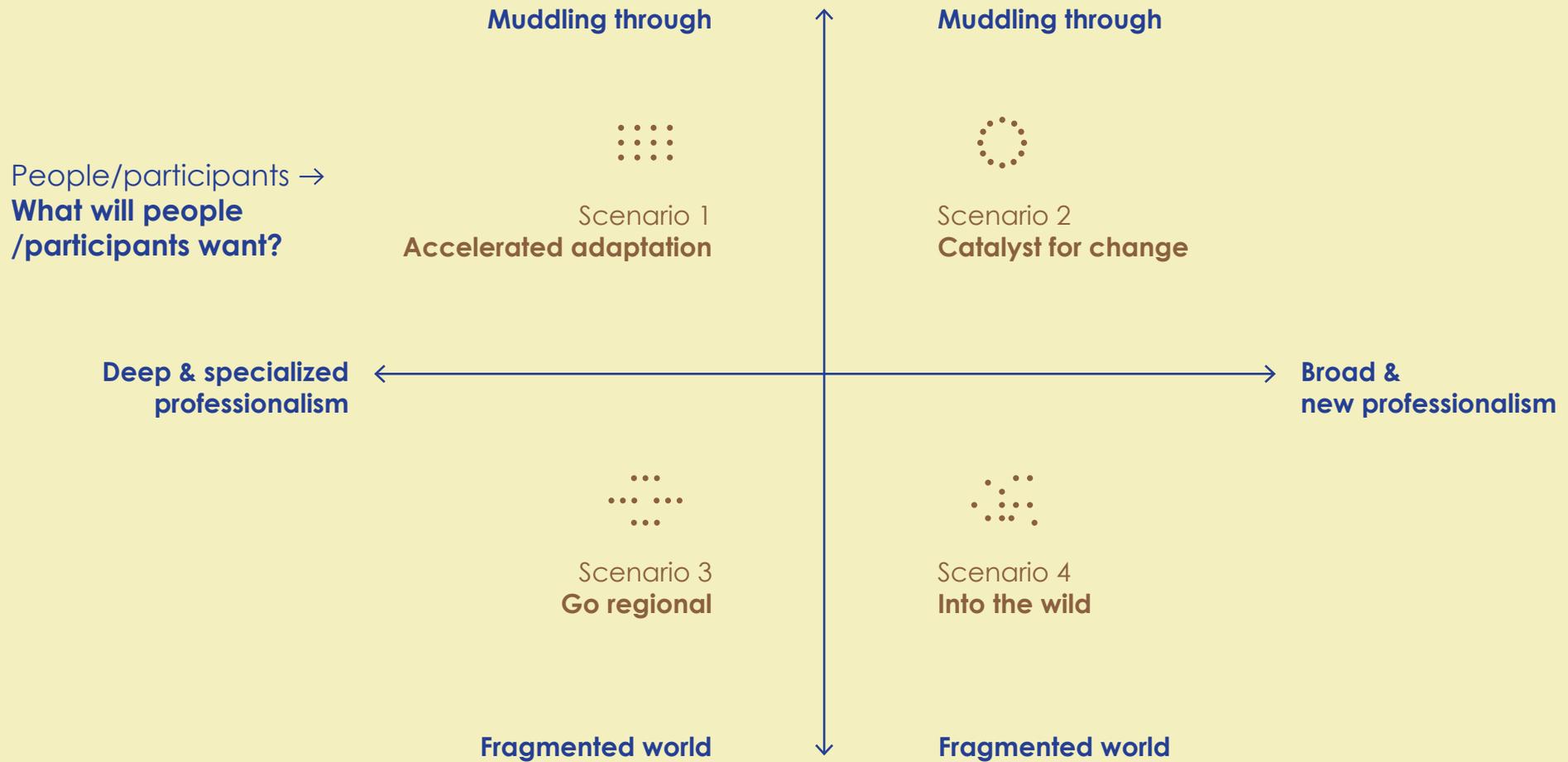


Fig.5:
Scenarios for congresses of the future

The four scenarios



Accelerated adaptation

Dimensions:

Deep and specialized professionalism/
Muddling through

People have always met and congregated, and so they will in 2040.

Association meetings remain a strong concept, continuing its long-standing growth record based on continuous and accelerated adaptation to the demands of the times.

The trend in 2040 is continued growth in association meetings, strongly focused on deep professional issues, and highly personalized to each participant. State-of-the-art knowledge sharing and tailor-made individualized programs go hand-in-hand.

The scene of congresses is changing, but remains recognizable. Sometimes participants are bored, sometimes they are pleasantly surprised, but they keep attending because they are gaining valuable personal return on investment – much as participants did a hundred years ago.

Accelerated adaptation

Background

In 2040 changing circumstances require adaptation. When the change accelerates, so must the adaptation. On the global level, China, India and other emerging economies are becoming increasingly dominant in size and narrowing the gap in wealth to the rich countries. Despite tensions, the global order holds through compromises. Stability is too important to all. The world adapts.

On the structural level, economies are becoming more alike and competition is tough, head to head, and focused on market share. It is a global battle. Climate change continues to be a pressing issue in a growing world with finite resources. Despite technological advances and political efforts, emissions are still a concern to politicians, to businesses and to ordinary people, including participants in association meetings.

Knowledge is key in the knowledge economy, which means science, education and professions are at the forefront. People with formal, certified skills and merits are increasingly sought in order to compete. That means professions are key to jobs and careers,

and there is an emphasis on titles, credentials and merits. The demand for professional knowledge is increasing fast. The professions must accelerate their adaptation. More frequent, more regional meetings continue to be the trend.

Purpose of meetings 2040

Association congresses and meetings first and foremost serve participants' need for professional updating and networking. Belonging to a global professional community is increasingly crucial to individuals' careers, and association meetings are central to this. Attendees are highly focused on getting a return on investment of money and – not least – time spent. They will travel globally to attend the best. But they are also expecting meetings to be sustainability-conscious and to have an impact which justifies their cost.

The meeting concept

Meeting concepts are developing and adapting too, mainly by the intensification and improvement of well-established program types, not least by applying new technologies. The trend in 2040 is global association meetings that are strongly focused on deep professional issues. State-of-the-

art knowledge sharing and tailor-made programs go hand in hand. Thus, your informal talks and dealings may be facilitated by your personal algorithm, aided by technologies like AI-robots. Global experts in their field are in high demand, keynote speakers as workshop facilitators, as master class professors, etc. There is live streaming and online discussions, but face-to-face presence and the marketplace of intense professional knowledge sharing is at a high premium.

And of course meetings need to demonstrate that they do indeed create PROI – Personal Return On Investment - for participants, as well as global and local impact and legacy. Some feel there is not that much that is exciting and new, but that is because adaptation is rarely radical. Still, it has steadily evolved the industry.

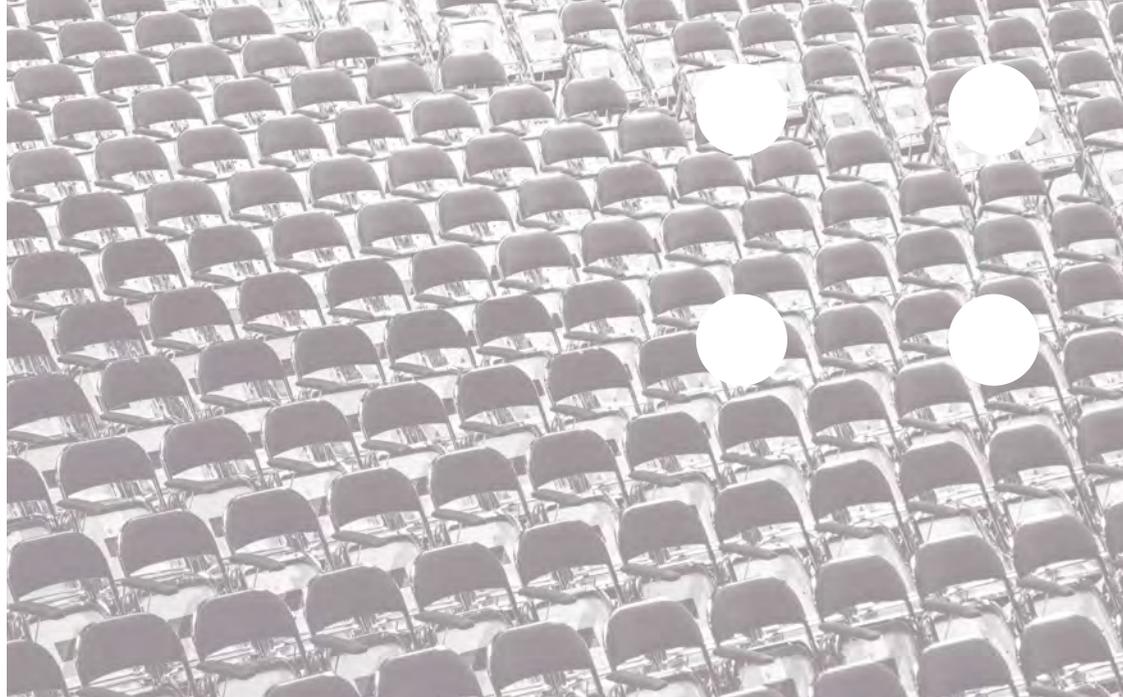
Role of associations

Associations serve as gatekeepers and professional authorities which is an increasingly important function in an environment obsessed with professional credentials and achievements. They are under pressure to adapt to increasing individualism and strive to remain relevant by serving as key to professional community, networking, and state-of-the-art professional knowledge. Members are viewed as customers, and associations are catering to their needs accordingly. Associations aim at providing valuable services and access to people with useful professional knowledge and contacts.

Role of destinations

Destinations that offer the full package

are in high demand. Accessibility, attractiveness and local engagement for socially responsible professionals who want to make a difference. Opportunities for leisure are also attractive, especially if they provide for professional networking. Global hubs are of course attractive in a globalizing environment.





Catalyst
for change

Dimensions:

Muddling through/
Broad and new professionalism

By 2040 we see the unfolding of a fundamental shift in social and economic structures as new technology takes over many activities previously undertaken by highly skilled specialists. Professionals need to make their skills human-centered.

Associations and congresses play a proactive and catalyzing role in forming and facilitating this new labor market of the future. They influence the social and political agenda. To members they are guides to the dramatically changing professional working life. They are portals to the new type of professional excellence and perspectives.

Meetings in time and space remain the most effective way to have intense and meaningful interactions, something that is increasingly important for both individuals and professions in times of change.

Catalyst for change

Background

In 2040 institutions and structures, though challenged, continue to serve as a stabilizing framework in a world of change. At the same time, economy and technology are veritable catalysts for change. We are seeing the unfolding of a fundamental shift in social and economic structures comparable in scale to earlier industrial revolutions, or even the transition from agricultural to industrial society. One huge change-maker is technology. Many traditional functions of highly skilled specialists like doctors, lawyers and engineers are being taken over by technology. This means that humans are under pressure to evolve professional skills that are uniquely human. Professions need to redefine themselves.

In order to compete, companies, organizations and institutions must excel in building personal relations and social competencies serving human needs. These include non-material needs like self-actualization and meaning. The transformation in the economy's way of functioning is changing our ways of working and creating new career orientations. Work and life tend to merge in an ongoing process of human interactions, relations, and

personal development. This transformation transcends many old patterns and structures and creates uncertainty as well as excitement.

Technology and the increasing service component in GDP lessen environmental impact per dollar. Growing population and economies pull in the opposite direction. Air travel is getting cleaner, but is by no means emissions free.

Purpose of meetings 2040

Meetings are catalysts for change. We meet in order to help shape the new job market agenda. We also meet to develop the human skills we need. To explore and share new developments in human orientations, which are central to success in the new economy. Meetings in time and space remain the best way to have intense and meaningful interactions, something that is increasingly important in all lines of work.

The meeting concept

Settings and programs facilitate personal conversations and transformational insights. Often these insights will be cross-professional, even transcending professions, given that all professions face similar challenges from a

transforming job market. Meetings are platforms for the authentic meeting of minds, sharpening awareness to critical developments in human orientations. Delivery is personal, intense and participationbased. There is a wide variety of concepts and platforms, often taking holistic approaches. Some of these have developed from traditional association meetings, others are completely new.

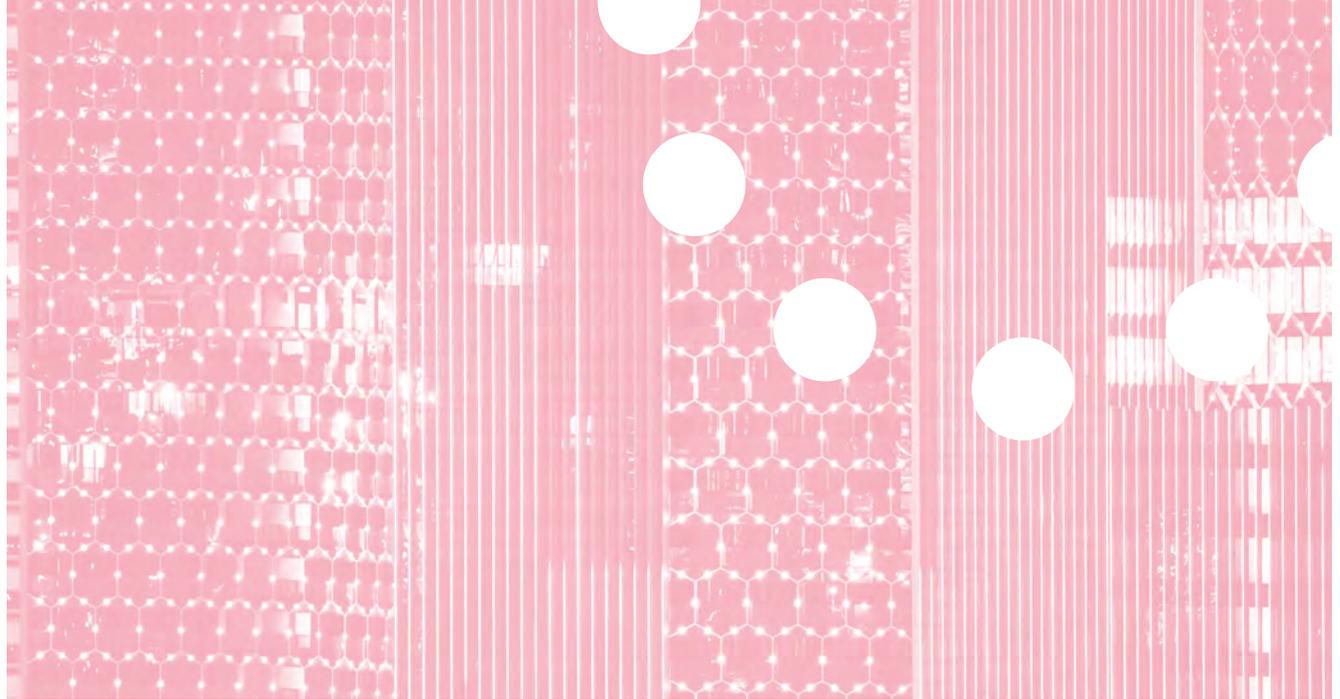
The role of associations

Associations, too, become catalysts for change. They function as members' guides to work and life, and a driving force for a new labor market agenda. Many new ones have been established, and successful existing ones have consciously changed into communities for HI – Human Intelligence. They are community and network facilitators. They provide meaningful filters and portals to guaranteed professional excellence and authenticity. But they are challenged by many other sources and guides serving other dimensions of work and life than the traditional formal professional ones. At the same time, associations find they can offer services that may appeal beyond traditional members. The professional world is organically community-based rather than formally member-based.

The role of destinations

Strong professional engagement opportunities are in high demand. They seek partnerships with congress organizers in order to exchange knowledge and inspiration creating strong synergies, impact, and legacies. Partners can be academic, or business clusters. Destinations are important as

settings for authentic meetings in a globalizing and human-oriented world. The meeting place is an essential part of the total experience. Meetings, like travel, must be transformative, and destinations that offer opportunities for personal and professional development are in high demand.





Go regional

Dimensions:

Deep and specialized professionalism/
Fragmented world

The world is out of sync. Different regions are moving forward at their own speed and terms.

Given the fragmentation of the world, there are fewer global meetings, and more regional and local meetings, accelerating an existing trend.

People attend association meetings to be updated about their professional field and industry as defined in their region.

The association meetings industry becomes fragmented, too, and there are different developments in different regions. Many destinations make a point of being regionally and locally distinct, differentiating on culture, language, history and natural surroundings.

Go regional

Background

In 2040 the world goes regional. Globalization is practically replaced by regionalization. There is an absence of global coordination and a quite unstable economic and political environment. Emerging countries and regions have confidence in their particular ways and standards, and rich regions are conservative in theirs. It is a world of friction, fragmentation and unsteady growth. Job markets tend to be locally, nationally, and regionally defined. This includes different technological standards dividing the world market into several distinct markets.

Upholding and developing professional standards is important to economic excellence everywhere, and hence to jobs and careers. They just do it differently in different regions.

Everything from curricula to business regulation depend on which part of the world you are in. Clearly, there is more dynamism within boundaries than across them. Global travel becomes more expensive and inconvenient due to the fragmenting trend, and to some extent because of global warming policies, even if they vary by region and country. Also, visa policies vary and

are subject to change, creating much inconvenience and barriers to travel.

Purpose of meetings 2040

People attend association meetings to be updated about their professional field and industry as defined in their region. They will sometimes get an interesting perspective from the rest of the world, but this is not strictly relevant to their job and career. Being a professional is relevant, and that means formal skills, merits, and deep know-how about approaches and standards in the particular world region where you live and work.

The meeting concept

Given the fragmentation of the world, there are fewer global meetings, and more regional and local meetings. Thus, the association meetings industry becomes fragmented, too, and there are different developments in different regions. North America, Europe, Asia, Africa and South America show very different levels of growth corresponding to their different stages of development and unaligned business cycles. In some regions meetings are booming, in others they are being challenged by online technologies, partly in response to climate change concerns and policies.

The regional variation in rules, e.g. compliance rules, make for different ways of funding and organizing meetings. Some regions have corporations provide funding and defining meetings, others are strictly professional. Language and norms are different, meeting cultures differ, and so does the use of meeting technology and innovations.

The role of associations

Associations go regional. The global role of associations is weakened, but the regional level of associations is strengthened in their role as professional communities and political organizations. There is a constant need for updating of specialized knowledge. Since a fragmenting, unstable world is also a more political world, associations take more active lobbying roles. They are also becoming important as mediators and translators among different professional approaches and standards across regions, and are often advocates for more global coordination.

The role of destinations

In a fragmented regionalizing world, regional hubs do better than global hubs. The trend is toward destinations serving a geographically smaller, but deeper market. Many make a point of being regionally and locally distinct, differentiating themselves on culture, language, history and natural surroundings. They engage with local communities on professional dimensions, but also in preserving local specialties, customs and ways of life.



Into the wild



Dimensions:

Broad and new professionalism/
Fragmented world

Welcome to the wild world of 2040. Global rivalry, political fragmentation, economic and professional transformations, innovation, experimentation, disruption, free-lancers, and self-employed micro-entrepreneurs.

In this ultra-dynamic and unpredictable environment, you have to invent and reinvent, or you risk becoming irrelevant. That goes for associations as well as for meetings and congresses. Elements are virtual reality, augmented reality, gaming, performance, art – often a mix of everything, where time and space become difficult to define.

Nothing changes – everything is new.

Into the wild

Background

In 2040 the world goes into the wild. The global situation is marked by rivalry and political fragmentation. The economy is being transformed into a dynamic ecosystem of innovation and experimentation. Big, established companies are being disrupted by startups, grassroot industries are constantly emerging and disappearing again, the job market is a constant churn, and large segments of the labor force are freelancers, self-employed, and working on a project basis. Artificial intelligence, robots, new materials, nanotech and gene tech are proliferating, merging and mixing, also with humans. Some are talking about a new phase in not just economic development, but in human evolution.

It is extremely difficult to coordinate on global issues, and there is a constant search for new thinking and technical solutions. Climate change is being addressed by introducing green energy technology, by megaprojects of climactic geo-engineering, by making societies resilient to flooding, by new types of agriculture in cities, oceans, desert regions etc. The political world may be fragmented, but the economic world is integrated, like a jungle.

Purpose of meetings 2040

Meetings are commercialized and organized around the needs of individual participants and professional ecosystems. You need to meet personally with the people with the ideas that drive your market, or the person you could team up with on your next project, or the investors that could help your startup.

The meeting concept

Meetings are specialized market places. They deal with career opportunities, professional knowledge, and new understandings in a world of flux. They are marketed, developed and organized as an environment for sharing and exchanging useful knowledge – whether formal or informal. The business model is being redefined. Some are organized by professional associations, but many others are entering the field, including NGOs, grassroots, festivals, gaming companies, or other commercial interests. Meetings may be hybrids between virtual and real-life events applying holograms, VR, AR and other tech-based tools. Conversely, some are organized as completely tech-free zones.

Specialized custom-tailored networking

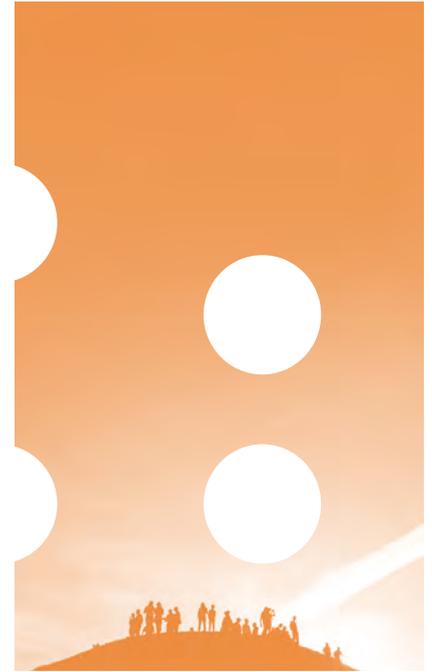
take place before, during and after meetings. Access to specialized bits of knowledge can make the difference to your personal career and market value. Technology is a necessary tool, but personal meetings with the right people often is key to profitable ventures, careers and relationships.

The role of associations

Associations go into the wild as well. Their formal structures and professional authority are being challenged by a fast-moving world of experimentation and dissolution of boundaries, including professional boundaries. They risk being circumvented and being left irrelevant. One strategic response is opening up and becoming part of the organic economy, while serving as guides and network facilitators to their members. Another possibility is to continue to insist on basic professional values and hope to become attractive islands of order in a world gone wild.

The role of destinations

Unpredictability and disruption create ever shorter lead times and call for new and agile approaches. Instant conferences and substitute events are ways of coping with dramatic capacity fluctuations. Destinations are becoming actively involved in developing meetings and concepts, partnering with a variety of partners. Destinations need to be more than a physical place, they are virtual places, too. Place-specific qualities can be a starting point, but there is room for imagining entirely new hybrid places. Elements can be virtual reality, augmented reality, gaming, art, performance, rituals – and real life.



Overview of the scenarios

	Scenario 1 Accelerated adaptation	Scenario 2 Catalyst of change	Scenario 3 Go regional	Scenario 4 Into the wild
Background	A world which is changing but not transforming – continuation of baseline trends	Transformation in economic structures. Need for redefining professions	Globalization replaced by regionalization. Friction and unsteady growth	Political fragmentation, jungle-like economic experimentation
Purpose of meetings 2040	Career and resumé, global professional community	To help shape the new job market agenda. To pursue human skills central to professional success	Updating intra-regional knowledge and resumé. Regional professional community	Individual participants and professional ecosystems. Ideas that drive your market
The meeting concept	Deep professional issues. State-of-the-art knowledge sharing and tailor-made programs	Personal, intense and participation based. Wide variety of concepts. Holistic approaches	Few global meetings. Many regional and local meetings. Strong regional differentiation	Specialized market places. Career opportunities, and new understandings in a world of flux. Business models redefined
The role of associations	Adapting to increasing individualism. Acting as key to professional community, networking, and state-of-the-art professional knowledge	Catalysts for change. Members' guides to work and life. Driving force for new labor market agenda	Associations go regional. Professional communities and active lobbying. Co-defining regional rules, advocating global coordination	They risk being circumvented and left irrelevant. Some strive to be part of the organic economy. Some insist on basic values despite challenges
The role of destinations	The full package: Accessibility, leisure, and local engagement for socially responsible professionals who want to make a difference	Strong professional engagement opportunities. Partnerships with clusters creating strong synergies, impact and legacies	Serving geographically smaller, but deeper markets. Regionally and locally distinct	Destinations are becoming actively involved in developing meetings and concepts, partnering with a variety of partners

Working with the scenarios

A strategic conversation

The scenarios are conceived as a method for supporting strategic and collaborative decision-making in the association meetings industry. The goal is to bring key players together and engage in a future-oriented process that sharpens and improves strategic decision-making. It inspires and facilitates a strategic conversation.

Reading the scenarios as presented here will hopefully stimulate your own thinking about the future. However, the more ambitious purpose is to engage groups of relevant people in a strategic conversation. We aim at achieving this by having the scenarios come alive and serve as the launching pad for such conversations and processes.

The scenarios will be represented physically and virtually by professional designers. It is a pioneering project at the interplay between futures studies and design thinking, aimed at producing an immersive and shared experience of the future as a basis for foresight, decisions, and strategy at an organizational level.

You may be involved as part of a group of people within your organization, or you can be part of an inter-organizational foresight and collaboration process involving different organizations.

The scenarios are given concrete physical form in four separate entities. They will be interacting with participants by auditive, visual and tactile means.

You will meet people who inhabit the scenario worlds and hear their story.

Participants prepare and define a challenge; they explore and engage with the future scenarios; and they devise strategic directions to be implemented in the present. It is in effect a guided journey to the future – the foresight – which returns you to the present – the backcasting.

The exercise gives you and your fellow participants a shared experience and sense about the future. Not just one particular possible future, but a future

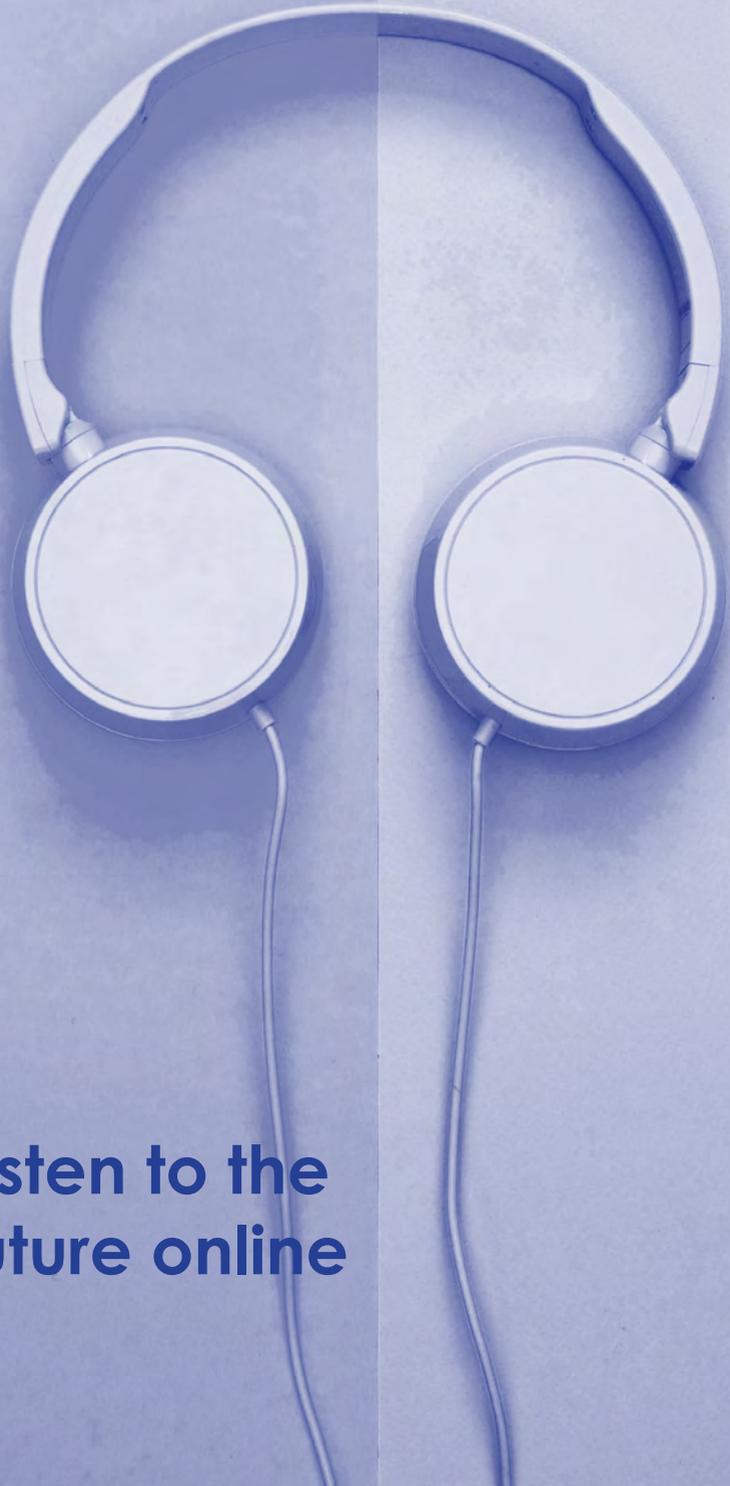
space made of four different alternative visions for the future. And not just by means of analysis, data information and verbal description, but in a form that engages people's senses as well as their minds.

There are many ways of organizing processes around the scenarios, and any particular process must be designed according to the needs and purposes of the concerned organization(s) and participants involved.

We look forward to shaping the future of congresses with you!



Listen to the future online



Go to copenhagencvb.com or bestcities.net/resources-learning and listen to the stories from the four different scenarios.

Digital personal stories
The four scenarios are developed into four audio narratives so you can listen to the stories whenever you like – in a learning context, at conferences, in strategy meetings or as inspiration in your own efforts to develop the future of congresses.

Each scenario includes an audio narrative with a general introduction and three different stories about what it is like to be a given person in that scenario. The audio track for each scenario lasts about 6 minutes.

Besides from listening to the audio narrative you can access this magazine in a digital version and download different tools that enables you to explore and shape the future yourself.

Sources & material

Interviews

A number of in-depth background interviews were conducted with global industry leaders, associations, experts and researchers in the field.

Workshops

- **BestCities board and business development group**
- **Workshop at IMEX Frankfurt with hand-picked industry experts**
- **Copenhagen workshop with industry agents, representatives from the city and universities**
- **Houston test session with BestCities Strategic Thinkers group**

Literature, surveys & analyses

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About Copenhagen Convention Bureau

Copenhagen Convention Bureau is the official convention bureau of the greater Copenhagen area. We are a non-profit organization cooperating closely with an extensive network of professional partners in Copenhagen. Together we offer advice and local expertise to ensure successful international congresses and business events.

Copenhagen CVB was established more than 20 years ago as an independent public-private partnership between the City of Copenhagen, the Capital Region of Greater Copenhagen and the local meeting industry in order to attract association congresses, corporate events and major sport events to the city and region.

Copenhagen CVB is constantly seeking knowledge and broadening industry networks by actively taking part in

international alliances. Consequently, Copenhagen CVB is a founding member of the BestCities Global Alliance. BestCities is a global convention bureau alliance of the most progressive convention bureaus in the world. The quality and reach of the BestCities global community and open knowledge exchange, allows partners and clients to develop and offer experiences that leave a stronger and lasting legacy on the world. With the alliance, Copenhagen CVB is committed to creating a positive impact through business events.

At present the BestCities alliance comprises 11 partner cities: Berlin, Bogota, Cape Town, Copenhagen, Dubai, Houston, Melbourne, Singapore, Tokyo and Vancouver.



About Danish Design Centre

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As Denmark's national design centre, it is our mission to promote the use of design in business and industry, to help professionalize the design industry and to document, promote and brand Danish design in Denmark and abroad.

The Danish Design Centre seeks to create the best possible meeting between the supply and demand side in the design area through systematic experiments with design as value creator for

companies. The ambition is that design should become one of the three most important positions of strength for Danish business.

This is done by bringing Danish designers and businesses together in innovative and challenging projects, which show new ways in which the use of design leads to new solutions based on customer needs. We thus give companies and organizations the opportunity



to test how design can strengthen innovation and development in practice.

The Danish Design Centre has an in-depth knowledge and experience of working involving and experimenting in the intersection between scenario development and design. In a systematic process, foresight provides an overview and reveals new plausible realities for future scientific associations and congresses. Backcasting is the activation of the scenarios, where design methods ensure that the scenarios become real and relatable. Backcasting makes it possible to act on scenarios for 2040, by exploring the significance and dilemmas that arise in the various scenarios of 20 years, 10 years and tomorrow.

Design has been the approach throughout the project. This means that our work is iterative, visually rooted, collaborative and usercentered.

Senior service designer Anne Danielsen has been the daily project manager and driving force for the progress and process of the project. Programme Director Sara Gry Striegler has been overall responsible for the project and has actively contributed with competent feedback and execution of activities through the entire process. Art Director My Buemann has been responsible for the visual identity, production of workshop material and final design of this magazine.

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About Public Futures

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Public Futures is a leading futures studies think tank specializing in societal development and public and private strategy. It was established in 2005 by experienced futurists and does strategic development work based on social analysis and futures studies. Clients are ministries, municipalities, NGOs and private sector Danish and international companies.

Public Futures pursues a future-oriented approach focusing on challenges and opportunities by linking perceptions of the future to current decisions and strategy.

Public Futures is a full member of Association of Professional Futurist (APF) and World Future Society (WFS).



Steen Svendsen

M.Sc. in Political Science, futurist and partner at Public Futures

Steen Svendsen has a background as a research director at the Copenhagen Institute for Futures Studies (1993-2000), consulting futurist to the British Government, Strategy Unit, Cabinet Office (2000-2001) and Head of Research at the Danish think tank House Monday Morning (2001-2004). He co-founded Public Futures in 2005 and House of Futures in 2009. Steen's core competencies are futures studies, vision processes, policy and strategy development and advisor to top management. Steen obtained a Master in Political Science from University of Copenhagen and Meiji University, Tokyo. At Meiji University he enrolled at the graduate school and developed his final thesis on the political system in Japan. After returning from Tokyo Steen was associated professor at the Institute for Asian Studies, Copenhagen University lecturing in Japanese political system and history.



Søren Steen Olsen

M.Sc. in Economics, futurist and partner at Public Futures

Søren Steen Olsen obtained a Master in Economics from the University of Copenhagen and has worked as a futurist at the Copenhagen Institute for Futures Studies (1992-2004), and an associate professor Copenhagen Business Scholl as well as University of Copenhagen. He co-founded Public Futures in 2005 and House of Futures in 2009. Søren specializes in futures studies, economics, analytics and statistics. Special fields of interest: Health care, social protection, labor markets, and long-range macro trends.

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