

March 2011 Survey: What strategic uncertainties keep New Zealanders awake at night?

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This working paper was prepared by the Sustainable Future Institute for participants of the StrategyNZ: Mapping our Future workshop held in March 2011. This survey would not have happened without a conversation between Murray Gribben, Roger Dennis, Nick Marsh and Wendy McGuinness in the Sustainable Future Institute offices. Further, the hard work of Lucy Foster, Rory Sarten and Grace White made this analysis possible.

In his book *Seven Strategy Questions: A simple approach for better execution* (2010), Harvard Business School Professor Robert Simons argues that in order for a company to make the most of its competitive strategy it has to constantly ask the right questions. He proposes seven key questions that you should ask as part of this process in order to anticipate change and respond in a way that repositions yourself, your entity, your city or your country as competitive. The last of Simons' seven questions: 'What strategic uncertainties keep you awake at night?', resonated with me when I heard him present his findings late in 2010.

Answers to this question should not only provide insight into the challenges ahead, what is often called foresight, but indicate where time and effort should be focused in the future. As such, these answers can drive strategy. Those things which keep us awake at night are likely to be the strategic uncertainties that impact on our decision-making during the day. When applied to our country, the answer to this question is likely to influence the future shape of New Zealand, because it not only captures foresight, but indicates how that foresight is likely to be operationalised; what we have called the strategic response. Both foresight and our strategic response require careful monitoring.

Importantly, issues that keep us awake at night are more likely to be urgent in nature than the 'slow-burning' issues that continue to gain momentum and escalate over time, possibly having a greater impact in the long-term. Because these slow-burning issues are often less obvious we need to work hard to ensure that any list of strategic uncertainties is both accurate and comprehensive. Asking 'what *is* keeping New Zealanders awake at night?' is a great starting point for a more strategic discussion about 'what *should be* keeping New Zealanders awake at night?'

Given that what keeps us awake at night is likely to drive our decisions during the day, it is useful to consider these strategic uncertainties as opportunities to drive change. A strategic uncertainty shared is more likely to help focus staff, communities and countries to better progress long-term outcomes. How we respond can transform strategic uncertainties into constructive opportunities, such as creating strategic knowledge, a national strategy and last, but most importantly, delivering a better and more robust society.

To add to information on New Zealand's long-term future, we surveyed New Zealanders in regard to the following three areas of strategic uncertainty: business (see Figure 1), Christchurch following the recent earthquakes (Figure 2) and the nation as a whole (Figure 3). Many responses were very in-depth and well considered, as shown by one Chief Executive's response below:

Question One: What strategic uncertainties keep you awake at night in regard to the future of your business?

1) The lack of certainty about the regulatory environment around Fibre to the Home, and whether there will be safeguards to prevent a Sky monopoly for content services in this arena. 2) The extent to which my key clients' marketing spend decisions are moving off shore, particularly to Australia, and therefore whether we need to establish a direct sales presence there.

Question Two: What strategic uncertainties keep you awake at night in regard to the future of Christchurch?

That we rush into the rebuild without thinking through a clear brand positioning for Christchurch as a place to live and do business in and be educated in. For example it could be the most eco friendly and designed city on the planet, given the extent of the rebuild, but that would require guts and firm regulation and probably some incentives to achieve.

Question Three: What strategic uncertainties keep you awake at night in regard to the future of New Zealand?

1) The lack of a clear national (country, not political party) strategy and multi-year plan of execution. 2) Will Auckland get it mostly right and be successful as a world class city of the likes of Melbourne, Sydney and Brisbane, or be an also ran mired on a lack of vision and fragmented minority interests that we spend too much valuable energy trying to reconcile.

How did the Institute conduct the survey?

The survey was made available online and distributed through a number of organisations and social media outlets. The Institute published a newsletter focused on the survey, and it was also publicised by The Royal Society of New Zealand and distributed to The Hugo Group, Deloitte/*Management Magazine's* Top 200 Companies in 2009 and Deloitte Fast 50 company executives. Respondents were asked to answer three survey questions and to supply some basic demographic information about themselves.

Who responded to the survey?

In total 165 responses to the survey were collected within the allocated survey response time. Based on the demographic information attained:

- The highest percentage of respondents (40.3%) came from the Wellington region. The remaining responses were divided among regions as follows: Auckland (18.9%), Queenstown (10.1%), Christchurch (9.4%), Dunedin (5.0%), Hamilton (5.0%), Nelson (3.1%), Napier/Hastings (2.5%), New Plymouth (1.9%), Tauranga (1.9%) and Whanganui (1.9%). Participants from other regions contributed no responses.
- The majority of respondents were male (62.9%).
- The majority of respondents were in the 40–59 age bracket (52.8%); the next most represented age bracket was 25–39 (23.3%), closely followed by the 60-plus age bracket (22.6%), with only a small portion of respondents below 25 years of age (1.3%).
- Respondents were asked to select one category that best represented their primary area of employment activity out of a possible 19 options. 'Professional, scientific and technical services' had the highest frequency of responses (20.8%), followed by 'education and training' (17.6%).
- The respondents identified their professional position in the following ways: chief executive (20.8%); senior management (22.6%); employee (24.5%); student (2.5%); retired (6.9%) and other (22.6%).
- Of those who identified themselves as a chief executive or senior management, the majority of respondents (71.0%) were from businesses with fewer than 100 staff. Most were from an organisation with an annual revenue of less than \$1 million (56.5%).

How were the results synthesised?

Our methodology for synthesising the survey is loosely based on the New Zealand Futures Trust methodology used to analyse the New Zealand Post Household Vision Survey (2001–2002). Reading through the responses multiple times we identified key words and recurrent ideas and arranged these into thematic groupings for each of the three questions.

Given that many respondents had worded their strategic uncertainties in the form of questions, it was decided a 'key questions' format was the best way to illustrate the themes that were identified. Where possible, words have been lifted directly from the responses, so as to optimise the respondents' voices.

How are the results presented?

The answers of many respondents were very detailed and raised multiple themes. The results for each question are displayed in a figure and supported by text. This means that the percentage shown for each theme reflects the number of respondents (out of 165) that shared a common theme, and as such the total of all the percentages for each question will be well over 100. Please also note, the themes are not presented in any particular order, however the size of the circle is used in the three figures (Figures 1 to 3) to reflect the frequency with which that theme arose.

What do the results mean?

In summary, the responses to Question 1 were predominantly concerned about government decision-making, followed by global issues such as economic trends, human resources, peak oil and adapting business practice in an evolving society. Responses to Question 2 addressed the strategic uncertainties associated with the rebuilding of Christchurch and the need for responsible decision-making. Responses to Question 3 were largely concerned with the need for strategic planning for the country as a whole, with a focus on environmental, social and economic uncertainties. Interestingly, peak oil was a more commonly shared strategic issue than climate change or the brain-drain. The common theme across all three questions was strategic uncertainty over the quality of government decision-making – in particular the responses imply government should work harder to improve long-term planning and public consultation.

How to use these results?

These survey results can be used as a tool to inform strategic knowledge on some of the uncertainties facing New Zealand. The thematic groupings highlight the concerns that faced New Zealanders in March 2011.

Conclusion

What we anticipate and how we respond to strategic uncertainties shapes our strategic future. This research illustrates the nature of the strategic uncertainties that are likely to drive change in New Zealand over the coming months and years. The challenge lies in gaining clarity over these uncertainties and then applying our resources and skills in such a way that we not only reduce the uncertainties, but invite dialogue and implement constructive change, so that New Zealand becomes a more robust and sustainable nation.

Results from Question 1: What strategic uncertainties keep you awake at night in regard to the future of your business?

Below, Figure 1 provides a snapshot of common themes and the frequency with which they were raised by respondents. On the following page is a detailed break

down of the responses which provides a more indepth understanding of the strategic uncertainties identified in the survey.

Figure 1 Themes that emerged in response to Question 1: What strategic uncertainties keep you awake at night in regard to the future of your business?



Survey participants' responses to Question 1

Theme 1: New Zealand's economy within the context of global economic trends (15% of respondents). Specific questions underpinning this theme include:

- What measures are being taken to safeguard against the impact of recession?
- How severely will our economy contract as a result of recession and how can I adapt?
- Considering that New Zealand is one of the only countries in the world that can sustain itself, why do we need to trade internationally?
- How can I expect my staff to survive on minimum wages?
- How can I cope with rising costs?
- How can we manage economic factors outside New Zealand (such as currency trading and international stock exchanges) to minimise the impact they have on our economy?
- How can New Zealand remain competitive as Asian economies grow?

Theme 2: Adapting business practice in an evolving society (8%). Specific questions underpinning this theme include:

- Can we move from good to great? How can this be achieved and what is the timeframe?
- What am I going to do now my main source of work has dried up?
- Where will my customers be in the future, and what will they want from me?
- Should we expand into different lines of business, merge or close down?
- Do we need to develop radically different ways of working and work-sharing, and if so, what would these look like?
- How can I use technology, social media, and the global village to negate the bureaucracy and give me a clearer 'line of sight' to my end consumer?

Theme 3: The expansion and survival of small businesses in New Zealand (8%). Specific questions underpinning this theme include:

- How can I break out of the evolving, young, small market economy of New Zealand and become a globally respected company and leader?
- How can my business thrive among interest rates and unreasonable, over-burdening legislation designed for big businesses?

- Is there a way to break through the 'entitlement', hubris and naivety of mainstream business and politics?
- Will small New Zealand businesses continue to have access to an affordable supply of skilled staff, energy and other resources, including water?

Theme 4: Retirement (3%). Specific questions underpinning this theme include:

- Who will drive my business forward when my energy flags?
- Why are 'the elderly' continually sidelined in the normal decision-making process?
- How can I continue to engage with society after I retire?
- How can I plan succession for my business?
- Where will I find the right person for business succession?
- At my age, what is my intellectual capacity to keep working?

Theme 5: The farming of our resources (5%). Specific questions underpinning this theme include:

- How do we find a balance between the long-term sustainability of our resources and the development of land, which is required for increased productivity and economic growth?
- What can we do about the continuing sales of New Zealand land to overseas investors, which are pushing land values beyond the average Kiwi's ability to buy?

Theme 6: Human resource issues (15%). Specific questions underpinning this theme include:

- How can our ability to attract and retain the highly skilled people we need in New Zealand compete with the job certainty and remuneration packages offered in Australia?
- How do we find and keep good staff?
- How do we change the fact that New Zealand has an anti-intellectual bias and does not value learning and education nearly enough?
- How do we source appropriate expertise and recruit the right people to enable growth?

Theme 7: Peak oil (9%). Specific questions underpinning this theme include:

- What will peak oil mean for our living standards and for production costs in New Zealand?

- All diesel engines can be converted to biofuel-running cars, so why are we still handing money over to fuel companies when we could make our own?
- Why is there a lack of support for alternative energy sources like wind and solar power, the input prices of which keep going up?
- What will our business do if we have no way to transport goods from A to B as a result of not being able to afford or access fuel?
- What will the effect be on international tourist arrivals and the tourism industry when oil prices reach untenable levels?
- What will happen to our fossil-fuel farming systems given our dependence on the fuel tank, from the day-to-day operation of the farm to the transport of product to the markets?

Theme 8: Government decision-making (or lack thereof) (26%). Specific questions underpinning this theme include:

- Why do governments make knee-jerk policy or legislative reactions to crises?
- Why is there little or no consultation within the New Zealand government's decision-making process?
- Why do well-intentioned government interventions not work?
- What is the future of central government health, welfare and savings, in comparison with the private sector?
- How do we make politicians understand that the world has changed and we need different economic and social models?
- Why does my small business have a lack of support from the government?
- Does the government understand the severity that the threat of climate change poses?
- How does the government intend to respond to climate change and its effects?
- How are government priorities changing?

Theme 9: Funding: sources and use (7%). Specific questions underpinning this theme include:

- Can the middle-class worker really sustain the taxes needed for the future needs of our welfare state?
- Why is it much easier to get funding to tackle the immediate issues rather than those which look further into the future?

- Why is there a lack of funding for carrying out forensic research in New Zealand?
- Will the public budget be able to continue to maintain public facilities?
- What can we do about the lack of availability of philanthropic funds?
- What will happen as New Zealanders have less time and energy to commit to voluntary work or to join voluntary societies?

Theme 10: The role of research, science and innovation in the future of New Zealand (6%). Specific questions underpinning this theme include:

- Is New Zealand going to allow the introduction of genetic modification seeds and animals?
- Why do New Zealand Crown Research Institutes keep appropriating taxpayer dollars for risky genetic engineering experiments?
- How can science contribute solutions to population explosion, resource-depleting lifestyles and climate change (alongside peak oil, natural habitat loss, starvation, warfare, terrorism etc.)?
- Are innovation and its downstream commercialisation aspects receiving enough attention?
- What does it mean to be a researcher in the 21st century; how does the work of research act on the world to bring about positive change?
- Where are our future scientists going to come from?
- Will our government continue to under-invest in research, science and technology?

Theme 11: Maintaining healthy local communities and making a social contribution (5%). Specific questions underpinning this theme include:

- How can I enable and support a community ethic within business?
- How can my university continue to make a useful contribution to a society where the need for good analysis and sophisticated understanding of global phenomena is critical, but not always appreciated?
- Will my city become an 'outpost' of Auckland?
- How can I create community cohesion and integrated participation?

Theme 12: Food security (5%). Specific questions underpinning this theme include:

- Will the government support the development of more organic food production nationwide?
- What will be the effect of changes in acts relating to food?
- Will something be done about the food regulation and country of origin labelling?
- Why is there such a 'crazy emphasis' on high-energy farming at a national level to supply international food markets?
- Why is the government failing to implement strategies which are appropriate to the imminent collapse of the food supply?
- How is New Zealand going to remain competitive in agriculture?

Theme 13: Sustaining our clean green image and creating long-term planning for sustainability (3%). Specific questions underpinning this theme include:

- Will New Zealand businesses 'wake up' to the efficiencies, opportunities and potential for innovation that lie in having a more sustainable strategy or approach to business?
- Does the government realise we have a weakening national brand due to poor environmental performances in areas such as greenhouse gas emissions and intensive agriculture?
- Do people realise we are going to lose our clean green tourism image unless we continue to maintain it?

- What will happen if we lose our image as clean and green?
- Why are we letting a lack of long-term government planning for sustainability create strategic uncertainties for our businesses?
- Why does the government have an 'on again, off again' approach to sustainability?
- Why are we not walking the talk?

Theme 14: Outliers (5%) include:

- Is there organised crime within my industry?
- Why is New Zealand continuously undermined by misinformation fed to a gullible public?
- Is New Zealand the place to be long-term?
- Why do we have to deal with hegemony in the U.S.A. and the attitude that they know best?

Theme 15: Not applicable (7%). Some respondents regarded this question as not applicable to them, either for unexplained reasons or because they did not own a business or were retired.

Theme 16: No strategic uncertainties (4%). Reasons for not being concerned include:

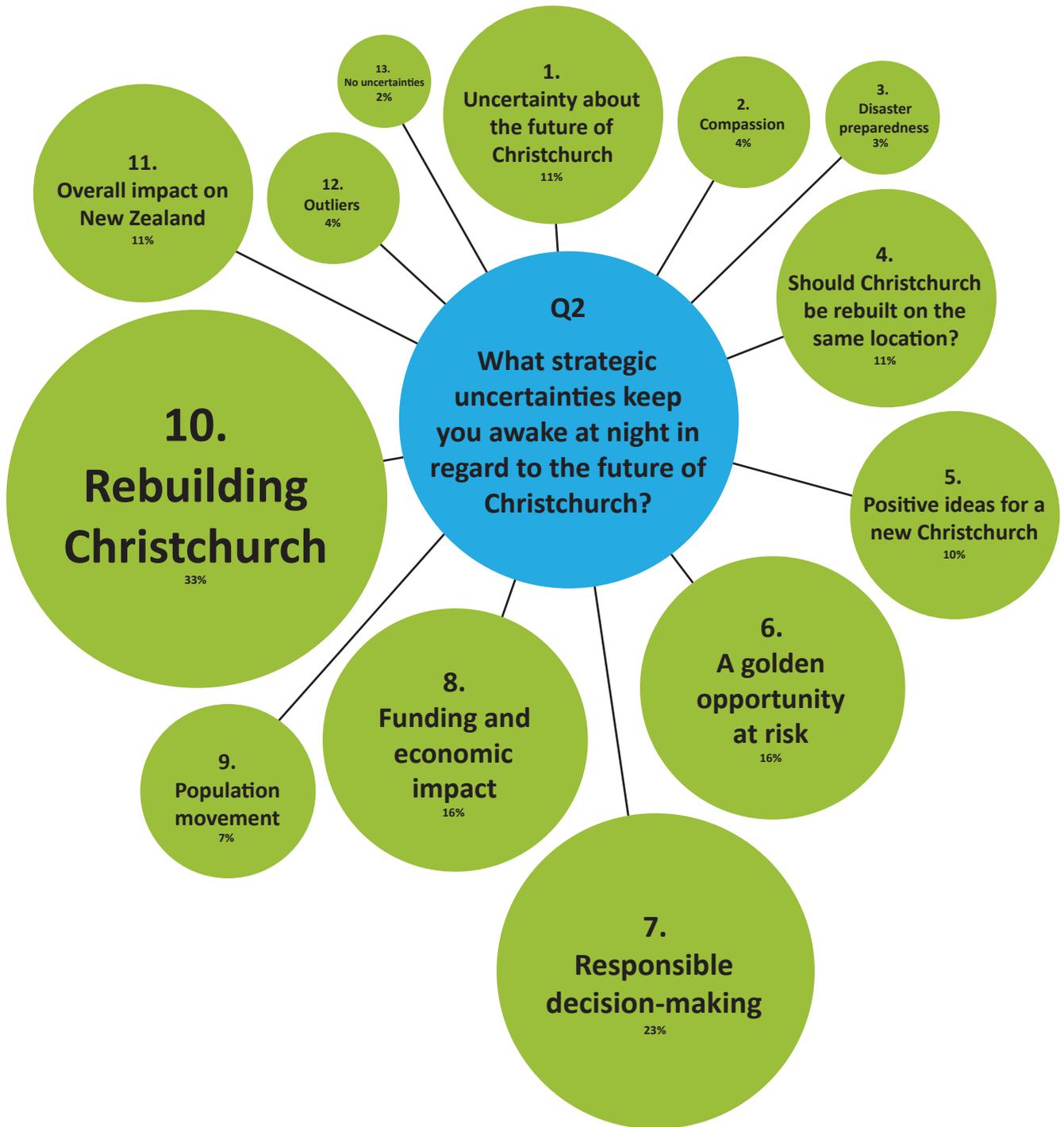
- I no longer have any control or influence over my business.
- I am not worrying about my job but instead worrying for other people who are losing jobs around me.
- I am not concerned because there is plenty of available work in my field of expertise.

Results from Question 2: What strategic uncertainties keep you awake at night in regard to the future of Christchurch?

Below, Figure 2 provides a snapshot of common themes and the frequency with which they were raised by respondents. On the following page is a detailed break

down of the responses which provides a more indepth understanding of the strategic uncertainties identified in the survey.

Figure 2 Themes identified in response to Question 2: What strategic uncertainties keep you awake at night in regard to the future of Christchurch?



Survey participants' responses to Question 2

Theme 1: General uncertainties about the future of Christchurch (11% of respondents). Specific questions underpinning this theme include:

- Where to start, what to do?
- How long will it take for Christchurch to stop shaking enough to be rebuilt?
- How many more earthquakes and for how long?
- Is there any certainty that Christchurch remains a safe place to live, work or study?
- When will it happen again?
- Can the city recover, or will it become a hollowed-out shell of a city?
- Will the central city get up and running again?
- Should Christchurch be rebuilt?
- How do we rebuild confidence?
- Who are we now?

Theme 2: Compassion for the on-going realities the victims must face (4%). Specific questions underpinning this theme include:

- Are the people getting what they need right now?
- Can we look after the homeless people and those with broken homes before winter?
- Why are we letting the media milk people's tragedies like this?
- What are the psychological, physical and financial consequences for the people living in Christchurch?
- Will the people of Christchurch get a fair deal and choices about whether they rebuild their lives in Christchurch or elsewhere?
- Will we take the time to grieve for what has been lost so that we make choices based on a heartfelt response rather than reactivity?
- Why is there such a lack of understanding with the demolition process?

Theme 3: A new era of disaster-preparedness for New Zealand (3%). Specific questions underpinning this theme include:

- What has been learned from this earthquake?
- What is being done in the rest of the country to ensure our towns and communities are not so dependent on vulnerable infrastructure in case of disaster?
- What about the many other New Zealand cities built in quake-prone areas?

- Why do we build where we do?
- Have New Zealanders realised that anywhere in the country could be affected seriously by an earthquake and potential tsunami?
- What happens to a big city when there is fundamental change in the very land it is built on?
- Thinking about the future of Christchurch must include Wellington – how do we prepare the capital for the worst?
- Will we learn and apply everything possible from the lessons of Christchurch?
- What are we doing to prepare for a huge earthquake in Wellington or a volcanic eruption in Auckland?

Theme 4: Should Christchurch be rebuilt on the same location? (11%). Specific questions underpinning this theme include:

- Is rebuilding on the present location a wise idea?
- Where will the central business district be built?
- Do you move the central business district or opt for low-rise buildings?
- How do we plan for liquefaction?
- Why would we rebuild on such swampy land?
- Is it reasonable to rebuild the CBD where it is currently located, now knowing what the earthquake risks are?
- Could we develop Ashburton or Timaru instead?

Theme 5: Positive ideas for a new Christchurch (10%). Specific questions underpinning this theme include:

- How can New Zealand turn the rejuvenation into an asset with a positive drive for the future?
- How can we make Christchurch a fantastic new 'small' city of 200,000 with many parks and cycleways?
- How do we grab hold of this huge opportunity for Christchurch to be built as a sustainable city?
- How can we redesign it as a transition town, with communities and workplaces together with community gardens to reduce the carbon footprint of travellers?
- Could Christchurch become the digital capital of New Zealand as well as the eco-city of the South Pacific?
- Will Christchurch be redeveloped around public transport and integrated home and work functions in the same buildings and areas?
- Will emotion drive the rebuild rather than strategy?

- How do we balance this with the fact that people urgently need housing?

Theme 6: A golden opportunity at risk (16%). Specific questions underpinning this theme include:

- Will decisions be too rushed, causing the opportunity for a city that provides the best of the past, and of the future, to be missed?
- What if a knee-jerk reaction to rebuilding leaves us with a mediocre city?
- Will it just get rebuilt with more of the same-old assumptions and models?
- Will we use or squander the opportunity to really innovate?
- Because paradigms are so rooted in business-as-usual and culture-as-usual, is the opportunity to do something very different in Christchurch almost not there?

Theme 7: Responsible decision-making (23%). Specific questions underpinning this theme include:

- Are the right people making the decisions?
- What will the nature and role of the leadership which is required to rebuild our city look like?
- Is there any possibility for external input in the council's decision-making around the future of Christchurch?
- How can we render the city fit to live in, but most importantly, engage the various communities in this process in a meaningful way?
- Will decisions about rebuilding be based on a long-term vision, or short-term expediency?
- Will decision-making achieve the optimum balance between consensus/participation and decisiveness?
- Could the institute or body which plans the future of Christchurch be kept at arm's length from the city council?

Theme 8: Funding and economic impact (16%). Specific questions underpinning this theme include:

- How will the government pay for the rebuild?
- Will New Zealand get the inflow of insurance funds needed to rebuild Christchurch?
- How well and quickly will the local economy rebound?
- Will the money required to rebuild Christchurch send the rest of the country into third-world status economically?
- What will this mean for New Zealand when combined with the recession?

- What is the financial future for businesses affected by the earthquake?
- Will funding be redirected away from other parts of the country?
- Will overseas investment provide the capital for rebuilding?
- Would this leave us with immense debt to be paid or profits here going straight overseas?
- What will the future funding of the Earthquake Commission look like, and what will the wider implications be for domestic and business insurance?

Theme 9: Population movement (7%). Specific questions underpinning this theme include:

- Will Christchurch suffer permanent population loss, preventing it from recovering its economic and social strength?
- Are the people of Christchurch willing to stay while their shattered city is rebuilt?
- Will there be mass-migration to Auckland, turning the south into a 'backwater'?
- Will the population rebuild itself? If not then where are they going to go?
- Is the infrastructure sufficient in other areas of New Zealand to support such population movement?

Theme 10: Rebuilding Christchurch (33%). Specific questions underpinning this theme include:

- Will money be squandered on restoring poncy buildings instead of practical buildings?
- How will we deal with reticulated sewerage in earthquake-prone areas?
- Could new infrastructure include alternative sources of energy such as solar, tesla or hydro energy production?
- Will valuable resources be wasted by the government trying to protect heritage buildings?
- Are we going to waste money trying to keep the rugby world cup in Christchurch?
- Should the first priority be to clean up Christchurch and make it safe?

Theme 11: Overall impact on New Zealand (11%). Specific questions underpinning this theme include:

- What is the willingness of the nation as a whole to share the cost of construction?
- If Christchurch people scatter around the country, will this increase greater local pressure on jobs and housing, driving prices up and wages down?

- Will this distract government from dealing with long-term issues?
- Can the South Island recover from this significant setback?
- Will rebuilding Christchurch take all building resources from other parts of New Zealand?

Theme 12: Outliers (4%). Outlying questions that did not fit into other themes include:

- Why are we continuing to allow our clean water to be squandered by over-intensive dairy farmers?
- What will happen now that the international spotlight has moved to Japan's disaster?

- Will the government use this disaster as an excuse to implement their own personal agenda?

Theme 13: No strategic uncertainties (2%). Reasons for not being concerned include:

- I am not concerned because I feel New Zealanders have a unique, strong and compassionate psyche that will get us through.
- I am not concerned because eventually Christchurch will bounce back better off.

Results from Question 3: What strategic uncertainties keep you awake at night in regard to the future of New Zealand?

Below, Figure 3 provides a snapshot of common themes and the frequency with which they were raised by respondents. On the following page is a detailed break

down of the responses which provides a more indepth understanding of the strategic uncertainties identified in the survey.

Figure 3 Themes that emerged in response to Question 3: What strategic uncertainties keep you awake at night in regard to the future New Zealand?



Survey participants' responses to Question 3

Theme 1: Government strategy and forward planning (27% of respondents). Specific questions underpinning this theme include:

- Will New Zealand as a whole ever get out of the short-term thinking that is prevalent?
- Why is our government's approach to the future reactive rather than visionary?
- Why do major political parties seem unwilling to address major issues that will have a big impact on the country in the future?
- How do we change our focus from short-term results to long-term improvement?
- Is a three-year political cycle long enough to address long-term strategic questions?
- Why do we lack a clear, national, multi-year plan of execution?
- What exactly are we trying to do and how are we going about it?

Theme 2: Talk but no action: Missing out on opportunities (4%). Specific questions underpinning this theme include:

- There are so many opportunities within this country, why do we not see ourselves as being capable of being world-leaders at anything?
- We may be a small country, but why are we not taking the opportunity to be a leader?
- Why are we missing opportunities to position New Zealand as a leader in environmental/climate change solutions?
- Why are we thinking about things and talking about costs rather than taking any action?
- This country is well-known for being a laboratory for many things, so why are we continuing to plod along now without using these opportunities?
- Why is the government reluctant to take risks in order to deal with the 'tough' issues?
- Why is a large chunk of our population happy to accept their 'lot' rather than for us to be competitive in a world sense?

Theme 3: Implementing sustainable practices (14%). Specific questions underpinning this theme include:

- We need natural and sustainable models in all sectors: why is New Zealand not leading the world in developing and implementing ecological practices, from waste management to power, organic localised food production, alternative housing and more?

- Can New Zealand overall recognise the benefits (economic, social and environmental) of becoming a country with sustainability as a key agenda?

Theme 4: New Zealand's global identity (14%). Specific questions underpinning this theme include:

- How do we maintain our clean, green, 'pure' persona, while still maintaining a high quality of life for all New Zealanders?
- Will we sell out to overseas predators rather than looking after our people?
- How will New Zealand maintain its great overseas connection as being pure and natural?
- How can we get back to the middle of the OECD?
- How can New Zealand keep pace with other growing economies given the fact that it is one of the youngest first-world countries?
- Why is New Zealand falling behind the ranks of other developed nations?
- We should be embracing organic agriculture, chemical-free living and low-input lifestyles, in line with our clean green image, so why aren't we?
- How can we retain our Kiwi lifestyle?

Theme 5: Brain-drain (4%). Specific questions underpinning this theme include:

- Why is New Zealand training so many young bright students only to find there is no hope of work in their field in New Zealand so we lose them overseas?
- Are New Zealanders overqualified? Will graduating students be able to find work after finishing their degrees?
- Is New Zealand being used as a stepping stone to Australia?
- Why are we letting our low-salary economy lead to the brain-drain?

Theme 6: Economic uncertainties (23%). Specific questions underpinning this theme include:

- What can New Zealand do to change local banking policies and practices to facilitate strategic and desirable economic growth and fairly earned and distributed social wealth?
- How can we build a more resilient economy with a broader base?
- Will we see our savings rate improve enough or will we spend too much money on consumables and housing and be swamped by overseas money?

- Will the loss of jobs in Christchurch hit the overall economy?
- What mechanisms are being used or should be used to solve economic issues?
- Agriculture is an extremely important part of our economy but how do we develop other skills and technologies that are less reliant on limited resources such as land?
- How can we change the fact that our small economy is so reliant on exports of our produce rather than export of our ideas and knowledge?
- When are we going to make the transition from primary production to adding more value before we export?
- What would New Zealand do without tourism?

Theme 7: Our population, our society, our people (26%). Specific questions underpinning this theme include:

- When are the people of Aotearoa, as we are all tangata whenua, going to come first and not last?
- Why are we catering to minority interests at the expense of the greater good?
- When are we going to build communities which enable people to be healthy, and encourage workplaces to support healthy lifestyles?
- Will inequality and social disparity in New Zealand continue to increase?
- What is going to happen to superannuation with population increase?
- What can be done about violence in society?
- What strategies are in place to support our Māori population?
- Why is a growing proportion of the population over-represented in 'negative' statistics?
- Are we managing our multi-cultural population well?
- What is being done to prepare for population growth?

Theme 8: Peak oil (12%). Specific questions underpinning this theme include:

- How can we survive the death of oil?
- How will New Zealand cope with peak oil and the inability to export food?
- When the shortage of oil starts to take effect in terms of global travel and trade will New Zealand be able to sustain itself?
- With the threat of peak oil, what is our plan for New Zealand's energy supply?

- Are New Zealanders willing to take action to respond to the magnitude of peak oil?
- What international conflicts and issues could result from the peak oil crisis?

Theme 9: Infrastructure (5%). Specific questions underpinning this theme include:

- Why are we not moving our transport from road to rail?
- How do we wean our transport sector off oil, and why is our government's transport policy not responding to the threat of peak oil?
- Why do we lack sensible, functional town-planning, and create urban sprawl instead?
- Why are we not prioritising hydro-energy generation?

Theme 10: Climate change (6%). Specific questions underpinning this theme include:

- Why are we part of the climate change problem rather than the solution?
- Who is thinking about (and going to bear) the cost of climate change, including the burden of the emissions trading scheme?
- What about the cost-effectiveness of the emissions trading scheme?

Theme 11: Our environment and the responsible management of our resources (27%). Specific questions underpinning this theme include:

- How are we going to address the impact of agricultural production on New Zealand's environment?
- How do we engage with and support Papatuanuku/our environment so that Papatuanuku continues to provide for us?
- Will Fonterra continue to grow and monopolise the growth in this country to such an extent that we will eventually have a ruined countryside where the waterways and substrate have all been spoiled by the pollution caused by dairying?
- Why do we not have policies to ensure that New Zealand's environment and land will sustain us if necessary?
- How do we teach people not to foul our waterways?
- Why are we letting GE destroy our clean, green image?
- Why is the government continuing to dabble in risky and unethical genetic engineering experiments?

Theme 12: Outliers (9%). Outlying questions that did not fit into other themes include:

- What about the foreigners who want to get rich quickly and then leave New Zealand?
- What will happen if China invades New Zealand?
- When are we going to learn to naturally balance our manure budgets?
- Which countries should New Zealand partner with in order to achieve our goals for the future?
- Are we going to become another Australian state?

Theme 13: No strategic uncertainties (5%). Reasons for not being concerned include:

- I am not concerned, New Zealand is unique and we'll cope!
- I am not concerned because New Zealanders are starting to wake up and live from a heart-open and conscious place.
- I am not concerned because I'm very optimistic about the future of New Zealand.

Working paper to support:

Report 16b. *Inputs, Processes and Outputs from StrategyNZ: Mapping our Future: From Te Papa to the Legislative Council Chamber*

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