

THE MOTION QUESTION

The best thing about flying Concorde was arriving before you left. Concorde captivated us. It catapulted us. Its beautiful velocity made it timeless. Its sight, sound and motion made it a Lovemark. I regret its passing. A brave new world shattered by the harsh brutality of economics (and unimaginative management).

In the dynamism of “SiSoMo” – sight, sound and motion – it is the “Mo” that designs the future. For those of us who travel 500 000+ kilometers a year to get to work, the evolution of motion has big resonance. This goes beyond next generation supersonic business jets to whiz between New York and Paris, promising me an extra day a week. Wheel to wing to wire, it goes to the heart of the evolving human condition, the products that sustain it and the race to get to the future first.

Let's take the pulse of human motion, starting with some anecdotal signposts:

- Last December 9, 350 million viewers tuned in to the draw for a global spectacle where 22 men chase a ball around a field for 90 minutes. From February 10, all eyes will be on the Torino games. So much for static. People are moved by things that move. We are kinetic.
- What do you think low-income UK families spend their tax credits on? Alcohol and tobacco? No, says a new study. Their kids and – yes - cars.
- Dell's latest PC factory - WS1 - projects that PCs will roll off its assembly lines 40% faster than at other plants. Says Dell, one machine will come off the line every five seconds. That's quick.
- As airports and malls get bigger, muscles get sorer. Moving walkways average about 3 kph, slower than walking. Now, despite high heels and litigators, they are speeding up. German forerunner TurboTrack by ThyssenKrupp, hits 7kph - not exactly hair threatening. Big airports are killing me. Fiat, please design, monetize, globalize a 70 kph “travelator”.

- Remote villages in Uganda without power or phone lines can now make calls over VoIP, receive voicemail and send e-mail. San Fran-based non-profit Inveneo found a low cost sustainable power source. A bike. Fifteen minutes pedaling powers an hour on the VoIP phone.
- Eighteen million of me constantly travel the seven seas. 3500 cargo ships carry fifteen million of me across the Pacific, Atlantic and Indian oceans. My market is growing nearly three times as fast as the world economy. On ice, I cost as much as a mid-sized car. I am the building block of the global economy. What am I? A steel box. A container.
- Motion management is getting smart. Radio Frequency Identification spending climbed to about \$504 million in 2005, up 39% on 2004. By 2010, companies will spend \$3+ billion a year on RFID. Applications range from inventory tracking, talking prescriptions, credit payments and pet location to smart cards, biometrics, policing and road beacons. Ethics are tight. Who wants their underwear reporting on their whereabouts?
- In Silicon Valley, deal making has left the cubicle, the boardroom, even the golf course. It's on the crest of a wave and the edge of a trail. Cycling is the new golf. So is open-sea distance swimming, snowboarding, and kite surfing. Paul Saffo, research director at the Institute for the Future in Palo Alto: "If you're not part of the peloton, you're not part of the deal."
- A new coach in the UK - The Levante – is capable of carrying wheelchair users. Japanese researchers have gone one better with the Hybrid Assistive Limb, a robotic eco-skeleton that reads brain signals so the disabled and elderly can walk. With enterprise, no one gets left behind.
- Five hundred years after Sher Shah Suri commissioned the Grand Trunk Road in India, the bullock cart and rail engine are giving way to a new autobahn. India is America circa 1956, when the Interstate Highway System opened markets and put

GM on notice. Indian car showrooms are the new temples. “Chindia” is motorizing - discovering freedom, control, privacy, privilege, speed and status. The big pedal is on the metal.

- The data highway reinvents the world at speed you can't see. Distance collapses. The mass market dies. Amazon to e-Bay, niche demand is gathered and met. From Myspace.com (40m members) to Neopets.com (25m), the Inspirational Consumer assumes global power. Producers kneel. Wireless brings hope to Africa. The vista of the future opens.

As the line goes: “We’ve come a long way, baby”. Consider: a Boeing 747’s wing-span is longer than the first flight of the Wright brothers; the Airbus A380 has 50% more floor space than a 747 jumbo; Virgin Galactic will fly you to space.

Motion is about human self-determination. It is about necessity, sustenance, liberation, exploration, exhilaration, and much more. Buying a motor car is buying into a dream. Everywhere, the mention of Ferrari or Alfa Romeo makes the heart skip a beat. And who among us has not gone flying in their dreams?

I believe in the dream, that personalized mobility for all is possible (on your next trip to Paris, drop in on Toyota’s futuristic showroom on the Champs-Élysées, and see your personalized mobile future for yourself). Delivering the upside and managing the downside is not a question of rationalization or retrenchment. It is about collaboration, innovation, inspiration and action. It is about accelerating, diversifying and cleaning the exhaust, not hitting the brakes.

Currently, the typical car converts just 16% of the energy potential of its gasoline fuel into motion. That’s 84% wasted. As oil debates rage, great companies are driving forward with newer, cleaner, more efficient and intelligent technologies. We need them fast and this is how to win. It’s fantastic to see Fiat powering into flex-fuel and hydrogen fuel cell systems, and Enel rolling out smart meters (allowing for hour-by-hour variation in power prices).

Renewables are back, and they’re not just surfing off high oil prices. Technology and new business models are closing the cost gap and – critically - investors can smell money.

Investments in “new renewables” grew from around \$24 billion in 2003 to \$29 billion in 2004. The markets for solar, wind, and fuel cells are projected to grow from an estimated \$16 billion in 2004 to \$102 billion in 2014.

The future of motion will be clean, personalized, intelligent and inclusive. So, how to speed there with minimum bumps? How to build Rome in a day? Same way Sergio Marchionne is rebuilding the Fiat Group. Panel by panel, model by model, innovation by innovation, inspiration by inspiration. I learnt this lesson at Pepsi in the Middle East. My colleagues saw Pepsi as a business of margins. I knew the cola business was won case by case. Individual cases of Pepsi sold by individual retailers to individual people who wanted to drink it. Want to change the world? Listen to Sergio on Fiat: ““You need to learn to breed lots of winning horses.”

Here are some future visions of the winners circle:

- The Power of Paradox will organize motion. Next year’s Boeing 787 Dreamliner - with its advanced engines and lighter body - is a line in the sky. Twenty percent less fuel than similar size planes and range of much larger jets and greater passenger comforts and lower cabin pressure.
- As participation culture deepens, consumers will generate their own power. With hot technologies and lower costs, households will generate clean electricity at home, using wind, solar and heat energy. Domestic windmills are already fashion. They are being called “the new handbags.”
- Transit points will transform. Already, airport lounges (like Virgin and Cathay Pacific) are trailblazing. It’s starting - everything from spa and massage, fine dining and exclusive suites to golf driving ranges and skiing machines.
- Scotty will beam you up. In 2004, physicist Anton Zeilinger teleported a photon (light particle) 600 meters across the Danube River. Quantum teleportation is here. Potential applications range from cryptography and computers to – one far away day – human travel. Stay tuned.

- As energy demands heighten, distribution systems will smarten. Traveling through gridlock to hub offices will give way to open source, distributed organizations. Transcontinental large scale agriculture will be challenged by local self-supplying organic models, like Whole Foods in the US. And however you have to get there, go see Peter Jackson's King Kong today! Plenty of motion in action.
- Just as cars will be built-to-order, air travel will be local point to local point. Flying to work in a sky car is coming. NASA, Boeing and entrepreneurs are already building personal Jetson-like air vehicles (check out Elwood Woody Norris' AirScooter, a Vespa in the sky!) And NASA is working on an on-board collision avoidance device using GPS technologies. (Oh and Sergio, don't give up on Lapo. Fiat needs his creativity.)

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