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### **Designing Effective Visioning Workshops**

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#### Abstract

CRISP is an EU Framework 7 funded project, with the aim of creating innovative sustainability pathways, and one of its early conclusions is that there is a substantial gap between what is currently practiced, and what future lifestyles would have to be; particularly in relation to the various low-carbon and energy efficiency targets envisaged for the long-term future. For instance, the UK has a legally binding target of achieving an 80% reduction in greenhouse gas emissions based on 1990 by 2050. The EU has a vision of reducing carbon emissions by 80-95% by 2050, based on 1990 and Germany has a target of using 80% renewables in its energy mix, also by 2050. Long-term targets nonetheless need radical change, and even gradual change over long periods of time may look in retrospective as a radical departure. Yet, without clear visions of how lifestyles would look like in these visions, it is difficult to design effective pathways, which will enable this transition. The central methodological component of the programme is to engage a diverse range of stakeholders in scenario and backcasting exercises. It is hoped that these exercises will encourage creative thought on the barriers, challenges and opportunities that exist in relation to the transition to a more sustainable Europe. From an operational perspective, the question is how to organize visioning workshops that deliver radical visions in a way that departs from permutations of the status quo, and which also does not reflect the organisers' perceptions and anticipations about the future. CRISP has conducted initial trial workshops of different alternative models for such workshops, which will be outlined, evaluated and compared in this paper, alongside recommendations for the eventual design.

## **Introduction**

*The trouble with our times is that the future is not what it used to be.*

Paul Valery (1871 - 1945)

Current levels of consumption and production are far from being sustainable, which means that, logically, efforts towards sustainable consumption and production must involve long-term, profound and deep change; be this an aggregation and compounding of gradual shifts over a long time, or more immediate, radical change. The impact profiles differ substantially with gradual change still allowing the accumulation of impacts for longer, so that its cumulative impact is often larger. It is thus not preferred when it comes to rapidly approaching emission limits, such as Greenhouse Gas emissions and Climate Change. Between these extremes, we find many alternative transition pathways between them, are also very different. Correspondingly, more radical change is typically associated with greater uncertainty, higher levels of political and societal leadership, greater need for more inclusive and cross-stakeholder engagement and involvement, more disruption, greater innovation spurs, and a much greater differentiation between who “wins” and who “loses”. Either way, the long-term view will show a very different future to our current situation.

As part of an approach designed to encourage wider discussion on the effective mobilisation of ‘transition pathways’, one of the fundamental objectives of CRISP has been to develop a programme of research based around the findings from a series of ‘deliberative stakeholder’ workshops in each of the participating countries. Therefore in Greece, Hungary, Lithuania, Norway, The Netherlands, and the UK these workshops have involved the participation of school children, different stakeholder groups, and members of the general public. Engaging school children in particular, was part of an objective to encourage an exploration of ‘generational’ viewpoints and perspectives on how people might live in 2030 and what the role of energy, food, and mobility might be with regard to current uncertainty. The outputs from these visioning workshops will then be developed into a smaller set of overall, pan-European scenarios - *endvisions*.

A series of follow up workshops will then be used to ‘backcast’ these endvisions across the 6 countries, where, drawing on the wider literature, but also considering current policy trajectories. The endvisions and the backcast workshops will then be evaluated, including the extent to which experts have been able to resonate with public perceptions of environmental risk, economic welfare and also individual quality of life. The project will also consider what policy changes might be effective, what these might mean in terms of fairness, acceptability, and feasibility, and what recommendations might be made to policy makers as they search for a way out of the sustainability conundrum.

## **The challenge of sustainability for effective transition pathways**

Climate Change mitigation and adaptation – and the associated quest for low-carbon, sustainable lifestyles - are issues where radical change seem to be much more urgent. This is apparent in the way governments have set out long-term policy targets, which imply deep and structural change: For instance, the UK Climate Change Act has set a legally binding target of achieving an 80% reduction in greenhouse gas emissions based on 1990 levels by 2050. This clearly indicates a more central role for environmental issues in consideration of the present and future policy agenda and will provide a significant benchmark for all aspects of sustainability in the UK. In a similar way, the EU has put in place a similar long-term target to the UK on reducing carbon emissions by 2050. Since 2007, the EU has incorporated the *20-20-20 Framework* into its decision making process, which sets out these targets:

- 20% energy reduction through increases in energy efficiency by 2020
- A 20% increase in the use of renewable energy
- An increase of 10% in the share of biofuels in transport

These are to be achieved using a mixture of policies and initiatives, including a further drive towards energy-efficient technologies (including CCS); development of an emissions trading regime for large emitters; better integration and harmonisation of energy markets as well as of energy policy (EU Strategic Energy Plan). The need to improve and invigorate progress towards these targets should be seen in the light of the EU Commission's "Roadmap for moving to a competitive low-carbon economy in 2050", which states

*"In order to keep climate change below 2°C, the European Council reconfirmed in February 2011 the EU objective of reducing greenhouse gas emissions by 80-95% by 2050 compared to 1990. ... The transition towards a competitive low carbon economy means that the EU should prepare for reductions in its domestic emissions by 80% by 2050 compared to 1990."* (EU 2011)

As with the UK target, this is clearly ambitious, especially in relation to the continuing trends, which characterise current pathways and trajectories. To date, there has been no precedent of any society that has achieved such a radical shift in its energy and product mix, whilst at the same time maintaining economic and social stability. However, this paper will focus on developing the processes of social deliberation to produce visions of low-carbon, sustainable lifestyles. Practically as well as ethically, the process of such transitions has a number of design requirements – explored in the CRISP project, and set out below:

- For ethical as well as practical reasons, those affected by such change need to be involved in the design and pursuit of alternative futures. This requires stakeholder engagement with the public and a wide variety of other change

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agents, especially younger generations with regard to their visions, anticipations and requirements for such futures.

- The discussion about alternatives for the future needs to encompass lifestyles, products, the economic system, ethical values and preferences, innovation drivers and the role of various stakeholders and interested partners in their pursuit.
- It is necessary to develop alternative transition pathways as an inclusive, social process that needs to “start in the future we hope to achieve”, as opposed to developing alternative trajectories from today’s context. Many technologies and systems required for such radical change have not yet been implemented – in fact, some have not even been invented – and at the current rapid rate of technological progress, it is difficult to develop reliable and robust scenarios that are based on technology trajectories as the main driver.

The most suitable method through which to support this kind of stakeholder engagement is likely to be backcasting methodologies (Holmberg & Robert 2000), which attempt to develop scenarios that are aimed at long-term change and which are normative and exploratory at the same time – so-called 3<sup>rd</sup> generation scenarios (Sondeijker 2009). Many backcasting methodologies share a basic 2-stage premise, firstly, that future visions or scenarios are developed in ignorance – or deliberate setting aside – of current contexts. These are then, in a second step, prepared for in a successive process of planning for that future. Such a preparatory framework often yields insights into possible technology trajectories, regulatory interventions, social and attitudinal change, as well as different roles for various agents and actors at different levels of engagement that are useful to understand and conceptualise the scale of change at hand (Wehrmeyer et al 2002).

In addition, backcasting processes, as social processes of deliberation, often have important parallel effects to their primary aims and objectives. One of these can be a deeper understanding of the various visions, and a multi-stakeholder evaluation of differences and similarities in the kind of activities needed for the attainment of multiple desirable scenarios (or the avoidance of negative scenarios). Secondly, engaging in a constructive way with the future can be a motivating, enabling and constructive process for those involved (Chenoweth et al, 2006). In this way, radical change can become less worrying, less complex and more desirable, as well as achievable (Clayton et al, 2010).

This paper builds upon the above framework, but asks a very practical question for the context of low-carbon, sustainable lifestyles: how can we design workshops in which young people can explore and develop radical visions of different futures, which then can be back-cast and explored subsequently? This first step of the backcasting exercise, which is aimed at developing 3<sup>rd</sup> generation scenarios is vital, but also the most problematic aspect of the process, as the target audience might *ethically* be the right group to pick for this task, but would typically not be familiar the technical background that is helpful to understand the scale of change necessary.

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### **Methodology**

To support this part of the project, several experimental workshop sessions were organised and structured in Greece, the Netherlands, Lithuania and the UK, with a variety of (young) workshop participants, and with varying levels of prior knowledge on sustainability issues. The main objective of these sessions was “to develop visions of desirable, low-carbon living by 2030”, which was stated, in broadly similar fashion, as the objective for each session.

Heuristically, this is an example of action research (Argyris et al, 1985) and of participant observation (Bulmer, 2009). Only in one case was the workshop followed up with a brief evaluation of the experience, but the numbers are too small to be used in any quantitative or even statistical setting.

The majority of workshops lasted 2-3 hours, and participants were recruited from:

- Undergraduate – from engineering or business administration
- Postgraduate students – from the MBA programmes as well as environmental management or sustainable development fields
- Pupils – from a local school aged 16-18

Each session had 9-60 participants, with 1-3 facilitators involved. Larger sessions used nominal group techniques to split the participants into group sizes of between 5 and 9 participants. Some sessions had pre-reading, some started with a small lecture around the pertinent issues

This diversity of approaches reflects the experimental nature of the research design, although it does make an attribution of findings and ideas to specific variants in the workshop structures very much more difficult. This was seen as an acceptable price for the ability to explore differences in the way groups worked and explored “their” futures.

### **Lessons Learned**

A number of insights and lessons emerged through the pilot workshops, either because they changed the character of the groups’ performances (and their outcomes) identifiably, or they appeared as recurring themes between workshops. Points raised include:

- Overall, there was a general feeling amongst the participants that they enjoyed the experience and the challenges posed by the task they were given to work with. There seemed to be a general level of interest amongst the participants.
- There is clear reason to believe that participating pupils can work/think in terms of separating the topic areas. It was noted during the workshop that the pupils

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were often able to see the links between topic areas and combined them themselves, where appropriate.

- “Many ideas” produced by the groups is not the same as “good ideas”...!
- Whilst generic contexts produced more ideas, it was not clear that a specific type of workshop methodology would be more likely to produce more radical ideas. It is possible that different ways in which groups can interact and approach the task may do that, but this is untested.
- It is necessary to frame “the future” in concrete, practical terms. In as much as it is unhelpful to ask people to “be spontaneous!” and expect an innovative and immediate response, asking about “the future” was too complex. Asking how “a typical day in 2030” may look like, what participants would do etc proved more useful. In fact, the simple question “how do you want to live” was insightful, with a subsequent filtering of different, less sustainable, visions. “how are we going to get a Europe in 2030 where it’s nice to live” seemed a suitable starting point.
- The workshop suggested that pupils should not be underestimated in terms of what they know. This suggests that the introduction of detailed framework features early in the workshops might not be necessary as there is already a level of knowledge to kick start discussions. It was felt that pupils’ innate creativity could be lost here, where detailed framework features might steer them into too much of a predefined direction; interfering with the ability to develop inspiring end visions.
- With regard to the group dynamics, and especially if participants do not know each other beforehand, it is important to include a ‘warm up’ session to encourage individual and group discussion. An effective warm up period can also be used to obtain a certain amount of information early on in the discussion.
- Some form of introductory provision of future contexts and constraints was seen as an important aspect of the initial (or preparatory) stages of the workshops. However, it became apparent that it is important to find an effective balance between the detail provided in the introduction presented to the groups and the ideas generated organically by the workshop participants. Also, the phrasing of the introduction became important as different phrases were found to elicit different responses from workshop participants. By being very prescriptive, the eventual outcome or shape of the end vision was largely predetermined. This was further complicated where workshop participants had a good understanding of the issues involved. It was not immediately clear which methodologies might be best suited to producing ‘radical’ ideas during workshop discussions, as greater detail is obviously not the same as more radical.
- It was found that a discussion around the present day was not useful for some participants as it tended to lock them into specific ways of thinking about the future. This tallies with the emphasis in the workshops to not discuss “today”, but to look towards 2030 from the start, and reflects the strengths of the backcasting methodology.

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- The presentation of potential future images and actions can enable participants to ‘think out of the box’. This might be useful in encouraging participants to construct more radical scenarios than through more formal presentation of ideas.
- It was felt from this workshop that a facilitator needs to be present in the first few minutes of the group discussion in order to guide the participants in understanding what is required of them in the workshop and also in constructing their future vision(s).
- It was felt that a creative environment, such as the one developed in this workshop, can be conducive to enabling workshop participants to envision future possibilities and challenges that might occur in 2030. Window-less lecture halls should be avoided.
- It was felt that mixed gender workshops can provide good counterbalances and stimuli to creative thought. Female group members often came up with a more holistic and structured image for their future, revealing many behavioural and cultural elements around the importance of family. Male group members came up with more radical suggestions, much of them around the role of technology. Environmental limits seemed to be peripheral to a vision whereby technology would solve the world’s problems. There was a clear gender difference in opinions with male group members generally favouring a technological shift and women looking at change from a more social-behavioural route, with the family at the centre of this transition.
- Where participants had low initial knowledge, an accompanying absence of creative solutions was found on the part of the students. The facilitators were disappointed and concerned about this paucity of knowledge in their undergraduate students. This raises the question of ‘what level of knowledge should students who participate in the workshops hold’ and ‘to what extent group facilitation should include some direction’?
- Internet access and smart phones brought an additional challenge: Some ideas developed during this workshop were really interesting, and when these were explored with the students, it became clear that the ideas weren’t originally developed by them – they found them on the Internet, upgraded and adopted to their areas. We offered to the students to split into the groups and try to develop the ideas using the systems approach. The results were better, but they did not achieve consensus. This workshop showed that maybe it is better to have a degree of knowledge amongst participants from the beginning.
- It is unclear as yet where the trade-offs and the balance should be between detailed vs. radical visions as workshop outputs.

## **Conclusions**

When it comes to radical futures, a “one size fits all” approach is unlikely to materialise. The positive that can be gleaned from the workshop experience is that within the diversity of approaches taken, all of them elicited interesting responses, indicating that the dependency on workshop organisation to “get the structure right” is important, but not as critical as it might be supposed. All workshops produced some insights for the respective futures, and many workshop outputs were actually comparable. Having said this, it would be far beyond the scope of this paper to discuss the *content* output of these workshops, as this paper is primarily concerned with *process*. It seems a basic, but effective structure that is based on the above insights, and is sufficiently flexible to respond to concerns or issues that may arise would be the preferred option.

From the workshops that were conducted, it seems that 3 hours is a reasonable time span for a productive outcome. Theoretically, more time would be better, but it was not clear from the workshop experiences how much more (or better) the output would have been, and what in fact that marginal return of extra time would have been. It was apparent that the ideal conditions for the workshop room layout would be “cabaret style” (round tables with chairs around them) with one wall that can be used to hang several empty flipchart papers next to each other so that pupils can stick notes onto them. The room and setting should be conducive towards encouraging participants to “think out of the box”.

In the workshops that seemed to work the best, 5 distinct phases were implicitly or purposefully applied:

1. Introduction / Ice-breaking
2. Brainstorming / ideas generation
3. Clustering / structuring of ideas and concepts into intrinsically somewhat coherent subsets or clusters
4. Elaboration & exploration
5. Closeout.

This matches well with existing approaches to backcasting, which in turn suggests that it is structurally and organisationally difficult to separate visioning workshops that are part of backcasting processes to be inherently geared towards “more radical” or “more long-term” visions. That ambition seems to be part of the content, which is difficult to incorporate into both the design and organisation of the workshops.



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