

Meeting the Challenges of Growing cotton in Tomorrow's World

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Begin with the end in mind.

There is a saying that you should "begin with the end in mind". How does Australia's cotton industry see its position in the community by the year 2006? How will we be organising our activities, solving problems and operating as a rural industry in the next ten years? If we are to meet the challenges facing modern agriculture and at the same time have real influence over our destiny, the cotton industry is going to have to focus its energies on a shared vision of its future. Once we have some agreed image of where we want to be, the industry can set about working more effectively towards building that future. Security, prosperity and a greater acceptance by the community are likely to be key elements of that future.

Our changing world

Agriculture in developed countries is under growing public scrutiny. Having emerged through the industrial and agricultural revolutions where the pioneering spirit was a value highly supported by society, we now find ourselves entering an era of reflection, consolidation and sustainable production, based very much on the green revolution. Most industrialised nations have transformed from rural to urban based populations over the past 50 years creating a widening gap between where most people live and where food and fibre is produced. In Australia for instance 85% of the population lives within 80 kilometres of the seaboard and agriculture only accounts for around 3.3% of Gross Domestic Product (GDP). The growing community concern about forests, rivers, wetlands, and native grasslands seems focused

on the problems created by agriculturalists rather than on the growing demands to meet urban needs for food and fibre. Many in our population probably do not associate the food they eat and the clothes they wear with the source of those items and the need for someone and somewhere to produce these essentials. We have to realise that agriculture is not well understood by the community at large and we have to work at improving the knowledge gap.

With agriculture representing only 3.3% of GDP it would (in theory) only take 10 months for the Australian economy to make up for the loss if agriculture was to be shut down tomorrow. Agricultural products could be out-sourced from overseas just as many secondary and tertiary items are today. Cotton is just one part of that agricultural sector and is dwarfed by the wool, dairy, beef, fishing, and wheat industries. Whilst we as 1400 cotton farmers think we have an important place we have to be reminded from time to time about our position in the broader community. It is important that we feel proud of the many things we have achieved but at the same time we must listen to the public concerns. If we or any other industry fails to work effectively with the broader community then a time could arise when that industry's product is sourced from outside Australia.

Agriculture has to accept its responsibilities and take ownership of its problems. History has a lot to account for as well! Much of our forests and a vast area of our grazing and farming lands were cleared last century and early this century along with the construction of many of the weirs and diversions along the Murray-Darling system. We can learn from the past but history remains and our energies need to be focused on shaping a desirable future. Our increasing awareness and understanding of natural and biological processes obligates modern agriculturalists to be aware of the wider implications and consequences of their activities at the social, economic and environmental levels. Failing to grasp our responsibilities for protecting the agricultural resource and minimising our impact on the environment will result in a bleak and unsettled future for Australia's intensive farming industries.

The end of isolation - the beginning of a community approach

We are in the age of information with cotton farming leading Australia's rural industries into the exciting and promising world of biotechnology. Farming is changing from the more isolated, self determined lifestyles of basic agrarian pursuits involving ploughing, planting, watering, protecting and harvesting to the technical and business worlds of modern agriculture where integrated farm management, sustainable production strategies, more complex cropping systems, environmental diligence, sophisticated marketing, financial planning, and on-line electronic communications are the driving forces. No longer can we live divorced from our neighbour, our actions have to be seen and understood in a broader context. All our farming activities have consequences, as the Helix™ and endosulfan residue issues have shown. Our actions are not isolated and unconnected events and the benefits which may go to one person can not offset an unreasonable and unjust impact on someone or someplace else. Doing your own thing and looking after number one has no place in modern agriculture where the value of networking, community involvement and regional support are the keys to long term success.

All actions have consequences and short term gains may come with significant long term costs. The failure of an individual to follow desirable practices could lead to longer term problems for neighbours or the industry as a whole. Insecticide resistance, chemical contamination of waterways and conflict with local communities are examples. This is the concern that many of the heads of current cotton industry bodies face daily and seem almost powerless to solve. Individuals have to see sense in what they do and the answer may lie in a rethink of the decision making and communication processes used in the industry.

The challenges from outside and from within.

We live in a period when many in the community are questioning the wisdom

of past development and are forming opinions on many key resource issues. Pesticides, genetic manipulation, soil degradation, salinity, competition for water resources, sustainable production practices, occupational health and safety, and trade and subsidy matters are all on the public and political agendas of most developed nations. While many producers may see these issues as leading to excessive intrusions into the process of efficient business, to the wider community they are important issues requiring community attention. Droughts, floods and tempest are rapidly being overtaken by these more complex issues as the the major problems impacting on farm prosperity and day to day management.

Once the pride and backbone of many nations, agriculture today is a smaller and less well understood section of national economies that is regarded not so much for its ability to produce cheap and reliable food and fibre, but for its capacity to compete for and degrade natural resources. The general public in overseas countries may know very little about Australian agriculture apart from the wool industry, but many would be aware of the blue-green algae outbreaks in the Murray-Darling Basin and the controversies over our wood chip industries. Such is the focus of public concern in the nineties.

If we are to continue in cotton farming, it would seem that we need to marshal our resources to focus on an image of the industry for the future which encapsulates these problems and clarifies our values in relation to them. We need to shift some of the emphasis from individual farmers simply pursuing their own financial gains, or regional farmer groups overly concentrating just on local issues, to a greater appreciation of the benefits of a more focused and coordinated industry approach where the resources and talent of the industry can be better harnessed, coordinated and directed strategically towards our problems and common goals. This is the biggest challenge - overcoming the short sightedness within the industry which tends to focus on personal issues at the expense of the bigger picture.

Many of the issues such as access to water resources, ability to manage

biotechnology, salinity prevention and pesticide contamination are simply problems. The challenge is knowing how to deal with these problems and what processes to recruit to help solve them. No individual has the answers, but a coordinated industry has the ability to make massive gains in its pursuit of long term security and prosperity. This is not to say that every battle will be won. Take the timber industry for example. Through that industry's Forest Protection Society (supported by timber companies, land owners and timber workers), it has shown that resource based industries can achieve acceptable outcomes and agreements with government and the community, even when confronted with massive community concerns about resource utilisation and conservation issues. Without a coordinated approach the timber industry may have been more severely disadvantaged than it is today. More timber communities may have been lost. Through its campaigns the Forest Protection Society has been able to play a key role in the design of the Regional Forest Agreement which has provided resource security, met acceptable sustainability targets and assisted compensation for many people affected by forest closures.

The issues facing the cotton industry are perhaps more acute than for the forest industries. Pesticides, access to water and insect management are our industry's greatest problems. This being the case it would seem even more important for our industry to combine its resources and develop strategies to help it deal with these issues. For many growers within the cotton industry there is a continual sense of frustration and helplessness in regards to these matters. How many times do people go to local meetings and discuss the same old issues and at the end of the meeting go home feeling no progress or forward direction has been forthcoming? How many times do we go to meetings just to see the same old band of faces in attendance (the converted if you like)? How often do we feel there are too many meetings but not enough action? This is another manifestation of the main challenge - the ability of all the industry participants to work as an industry. If we were to turn these meetings around so that the energies which evaporate in frustration become the driving force for action and organisation the gains would start to flow. Perhaps we all need to look at how much we individually put into our industry

and not how much we take out of it.

Why do we always get the same groups of dedicated people working on industry bodies? Do those people who take a less active role feel the problems and issues are being overly exaggerated or do not exist? As an example for some time the industry has been promoting pupal control as a means of reducing resistance to chemicals yet following the 1996 season many wheat crops were planted into cotton stubble without acceptable pupal control techniques. Why? Is the information properly communicated? Is there no understanding of the consequences of lack of pupal control? Perhaps there is a feeling that industry groups are moving in the wrong direction on this issue?

People may feel they are being told what they need to do and are resisting these intrusions? Is the fear of being regulated at the heart of any dissension? Do these people feel their interests are not being considered and so refuse to be involved in industry matters? These are important questions since any attempts to galvanise and coordinate the industry will be dependent on the support of individuals and their ownership of the problems we face. Any strategic planning must deal with the culture within the industry. If there is a significant proportion of producers who see no point to developing plans and designing strategic actions we have to know why. How do they see the problems and what are their solutions?

The cotton industry has two important questions to address. How do we get our house in order and how do we favourably influence others including the community, governments and special interest groups?

When dealing with problems affecting the cotton industry a key factor is the responsibility we take as individuals to contribute to the progress towards a solution. Growers for example can be simply producers of cotton focused on their own farm or region, or they can be more widely visioned and view themselves as part of the whole cotton industry contributing to industry organisations and guiding their own activities in harmony with industry values

and standards. Individuals cannot be forced into becoming industry people, it has to be something they value and want to do.

Everyone who is involved with the cotton industry should realise that their actions will be interpreted by the wider community as being representative of the cotton industry. These perceptions inevitably become the reality. If they are doing something that is unacceptable then the whole industry will be coloured by that action.

Industry bodies function best when they have good support from the industry whether that be from growers, researchers, shippers, classers, processors and so forth. The input of individuals determines the future and industry bodies facilitate the work getting done. If we criticise our representative bodies and their representatives for not doing the things we believe they should be doing then we criticise the "processes" we employ in the industry to make things work. We are criticising the way we get things done - the way our industry does its business. We are in fact criticising ourselves. For our industry to move forward and overcome the obstacles and problems it encounters it must have proper processes in place and genuine commitment from people. There will always be a diversity of views on a particular issue. Provided our industry bodies are run with openness and integrity the divergence of views offers a great opportunity to consider the many facets of a particular issue. Information exchange and a shifting of our paradigms (our mental models which have conditioned how we see an issue) can help us work through a problem to a robust solution or compromise, exposing the self-centred agendas and non-factual information which often camouflage the truth. We have to ask ourselves - does the Australian cotton industry currently have effective systems to deal with dialogue on important issues which can influence its future?

Meeting the challenges and moving forward

In the early years of the industry the process of dealing with problems was

fairly simple. Between Auscott, The Namoi Cooperative and The Queensland Cotton Marketing Board many industry issues were dealt with quickly, efficiently and at little cost to the production sector. Decisions were made and action was initiated. The industry was much smaller then and despite the issue of DDT the problems of being a cotton producer were no where as complex as they are today.

Being a relatively young industry the Australian cotton industry is not overly beleaguered with the internal politics and hierarchy that govern other primary industries. The relatively small number of producers coupled to their reasonably close geographical spread and market focus have been important components in the success of our industry at the research, financial and production levels to date. However, the growing pains are emerging and today the industry's organisational capacity is being tested.

In 1972 when the Australian Cotton Foundation (ACF) was formed there were around one hundred growers and areas like the Gwydir Valley were not producing cotton, while the Macquarie Valley had a mere handful of producers. By 1978-79 the industry was producing some 250,000 bales of cotton from around 150 growers. The mid eighties saw a sharp rise to around 400 growers and by the early 1990's grower numbers had risen to 1200. Today there are an estimated 1400-1500 actual grower entities with the potential to produce 2.5 to 3 million bales of cotton. They also employ a large number of people throughout rural NSW and Queensland. Servicing this industry are a multitude of organisations. There are 13 cotton grower associations, numerous processing and marketing organisations, various industry bodies such as Australian Cotton Grower's Research Association (ACGRA), The Cotton Research and Development Corporation (CRDC), The Cooperative Research Centre for Sustainable Cotton Production (CRC), the ACF, The Cotton Consultants Association (CCA), The Raw Cotton Marketing and Advisory Committee (RCMAC), Cotton Seed Distributors (CSD), The Australian Classer's Association, The Cotton Shipper's Association, the Cotton Industry Task Force (CITF) and many more. Many people, particularly new

growers, do not understand the roles, responsibilities and linkages between these bodies.

Furthermore we have the various irrigation groups dominated by cotton producers at local and regional levels all of whom tie in to the state irrigation body the Irrigator's Council; groups dealing with pesticides and biotechnology such as Australian Insecticide Resistance Advisory Committee (AIRAC) and Transgenic and Insect Management Strategies Committee (TIMS); and various other government bodies including the Genetic Manipulation Advisory Committee (GMAC) and the National Registration Authority (NRA).

Set amongst this myriad of bodies is an industry under pressure and growers concerned about their future. Our industry bodies such as the ACF have been criticised for not solving the problems of the day. Is this criticism fair or do we need to examine our we support our industry organisations and review our individual performances so that we can meet the demands placed on us? Rather than viewing the levies which support some of these groups as simply costs we need to develop a system where such contributions are seen as investments in our future. The time has come to look long and hard at the way we organise this industry, the way we seek input and guidance from producers and the way people participate in industry coordination and decision making.

In August 1995 at the request of some growers and certain industry bodies an industry task force (known as the Cotton Industry Task Force) was set up involving virtually all the key industry bodies. The emergence of this interim committee reflected industry concerns that the chances of problem issues going either unattended or being under resourced were increasing. There was a feeling that a broader approach was required to deal with problems whereby the skills and expertise scattered throughout the various industry organisations could be more efficiently and effectively focused. The industry's growth and development appeared to have expanded beyond the ability of existing infrastructures.

The Eighth Australian Cotton Conference in August 1996 will be an important event which will highlight the need for industry unity, common purpose and direction. It will be a chance for individuals to think carefully about their responsibilities towards the industry and the community. Three key components of this conference will be the introduction of draft best management practices for the industry, the discussions on the management plans for transgenic cotton and the discussion of strategic planning issues for the industry.

a) Best management practices

Best management practices aim to combine the results of research and commercial experience into clearly defined procedures which will assist individual growers to deal with key environmental and social issues associated with pesticides and farming practices. Best management practices carried out by growers and supported by appropriate accreditation and compliance systems are a visible sign to the community of the industry putting its words of ideal into action ("walking the talk"). They are also a simple and effective way to introduce new people to our standards and are a critical means of reducing our impact on the environment. Best management practices combine our industry's resources - especially that important partnership between research, extension and growers that has been the backbone of our industry's rapid growth. The direction provided by best practices helps identify gaps in our knowledge and stimulates debate and encourages understanding.

Best practice comes with some traps. One of these is the failure of well intended plans to go beyond the rhetoric. Best practices, to be effective need some system of enforcement or compliance. What happens now if a grower doesn't want to support the insecticide management strategy or wants to spray when the wind is carrying the odour of chemicals into a town, or refuses to control *Heliothis* pupae? How does the Aerial Agricultural Association of Australia (AAAA) deal with a pilot or company that is not following acceptable practices? All these examples have the potential to bring the whole

industry into conflict with the community or regulatory bodies and in every case the industry is really powerless to bring these individuals into line with acceptable standards. Currently the only course of action is for the offended individuals to take civil legal action against the offending party.

Some people may resist the idea of compliance to best practices. It may be claimed that growers can simply supervise themselves to do the right thing however, this would be seen by the rest of the community to be like "putting the fox in charge of the hen house". If we as an industry do not set in place some robust mechanisms for self regulation and individually take a greater responsibility for ensuring compliance then some outside regulator is likely to do it for us in a way that is unnecessarily costly, inefficient and time consuming. We must work towards a method of ensuring that sound practices are followed with more than just lip service. Monsanto and the ACGRA are currently working towards a system that will ensure the effective policing and auditing of the resistance management plans for transgenic B.t. cotton (Ingard). This is relatively easy to do since licenses will only be issued to people who sign an agreement to follow certain conditions and these conditions will be policed and checked through a joint Monsanto and industry arrangement. Other industry practices will be more difficult to enforce unless a means of changing people's attitude and behaviour can be found. Individuals must realise that they have to take greater responsibility for their actions and act in the greater interests of their fellow producers and the community.

b) Management plans for transgenic cotton

Since the early research work started on the introduction of insect resistance genes into Australian cotton over a decade ago, when a former CSIRO researcher David Lockett first stimulated our minds at a Cotton Conference with the possibilities of the age of biotechnology, Australian growers have invested heavily in biotechnology research. In recent years growers have realised that the industry has to protect this new technology as a basis for sustainable cotton production for many years to come. As the age of

chemicals blends into the age of biotechnology we are experiencing an impassioned move by growers through the ACGRA and TIMS to create a vision of what they want for the future of this technology. These groups are working hard to have others enrol in this shared vision of a robust resistance management system for transgenic cottons. The key issue again will be the compliance by individuals of industry endorsed procedures.

c) Industry strategic plan

The third issue is the industry strategic plan. Macarthur Consulting Pty Ltd, a Brisbane based firm has been instructed by the Cotton Industry Task Force (CITF) to facilitate a process for the industry to develop a coordinated cotton industry strategic plan for the future. The views of most industry bodies and all producers (via grower associations) are being sought on those issues that are most important to the industry and to establish what objectives the various sectors of the industry are trying to achieve. Once collated the goal of the consultants is to work with the CITF to focus all the input and issues into a draft strategic plan which can then be discussed within the industry. A segment at the 8th Australian Cotton Conference has been set aside for both the presentation and discussion of the draft strategic plans. Any amendments will then be incorporated into a final strategic plan for release later in 1996.

An industry strategic plan will be of immense benefit. It will provide a focus for directing the industry's future activities, coordination of projects and efficient delivery of services. It will provide individuals with a guide to industry direction and open further opportunities for individuals to have input into future goals and objectives. Currently we have a great number of groups working hard but not always working efficiently together on issues. Each industry group will have a responsibility to review its own strategic planning and ensure that it is in harmony with the broader industry objectives. Better cross industry communication will be possible leading to the potential for better coordinated and resourced task forces to deal with issues.

The industry has already experienced the value of strategic plans and coordinated efforts through the ACF Environmental Audit of the early 1990's. This audit was a first for Australian agriculture and provided a clear focus for the environmental issues facing the cotton industry. It provided the industry with a proactive assignment. Recently there have been media reports of mining companies such as Western Mining Corporation also deciding to undertake such audits. Unfortunately the coordinated and strategic approach adopted with the audit has not often been followed through on other issues.

Strategic planning will only work if people understand why it is needed. It has to appeal to people and meet their needs. As the fabric of the strategic plan is woven into shape it will be important to ensure industry wide acceptance and ownership of it.

Strategic plans are not simply about public relations. Any advertising or promotion work that is not based on a sound basis of fact and genuine commitment to improvement will ultimately flounder, often to the increased detriment of the industry or group supporting the plan. If it were simply a matter of working harder on the public relations side life would be pretty simple. Strategic plans are about openness, the ownership of problems by individuals, the development of sound ideas, the breaking of restrictive mind sets and the ability to change so that the required strategies can be forthcoming.

Strategic plans are only effective if the organisation and industry in which they are to work has its culture right and knows where it is heading. Mission and vision statements prepared by management will not work unless the whole organisation, particularly at the grass roots level understands who and what they are and what they stand for. It relates back to the basic concept of individual values and commitment to those values. Without shared values to guide the industry then the strategic plans will fail due to lack of industry involvement and cohesiveness. Strategic plans have to be flexible allowing room for creativity, regular review and necessary change.

Strategic planning offers the industry the ability to change from being one that is highly reactive, where our direction is being determined by the conflicts and opinions of others, to a proactive industry that anticipates issues, has inspired input from individuals, organises its resources effectively and takes greater control of its destiny while still listening and being sensitive to the needs of others and the community as a whole. This can only happen when people can see the sense for change.

Being organised and anticipating problems, the ability to focus on issues and assemble necessary action plans and resources are best achieved when the industry is guided by some doctrine that articulates who we are, what we are and where we are going. This is the purpose of an industry strategic plan. Individuals and collectively as industry associations, people must critically examine their goals. An effective network of industry bodies would be a very effective tool. Each body needs to clarify its purpose and links with other industry organisations. From there the industry can implement its strategic plans. Are we lobbying state, federal and local governments effectively? Are we effectively communicating with the grass roots? How do we improve our image and support in the community ? Do we have sufficient information flow within the industry on critical issues such as water usage, the comparisons with other crops, the fate of our pesticides and our impact on the environment ? How do we work with those individuals that follow unacceptable practices that threaten industry interests?

Where to from here.

The individuals that make up this industry are the one's that will decide on the direction this industry takes. A mechanism is required that encourages input and allows the diverse range of views to be discussed and contemplated. No one person can say this is the way it will be - it has to be a shared future where people understand and accept why certain things are required. Having thrown up the problems of the industry it would be unfair to walk away having not put forward a suggested direction from here. To encourage debate and the

search for solutions the following proposal is offered.

Individuals have to take greater responsibility for their actions and their contributions to industry direction. As well they have to ensure that the industry has an adequate framework in place for servicing and coordinating industry affairs. The Cotton Industry Task Force (CITF) needs to continue its function of providing a forum for discussions across industry groups and to facilitate the finalisation and implementation of the strategic plan being developed by Macarthur Consulting. There has to be a firm commitment within the task force members and the people they represent that the strategic plan goes beyond a volume of words. The industry has to consider giving the CITF its full confidence and support to continue to drive the strategic planning process, its implementation and to develop compliance mechanisms where appropriate. This latter point will be a difficult issue and will no doubt encounter resistance. No one likes to be regulated, and especially not farmers. The duty of the task force will be to communicate with the industry and clarify why some robust form of industry regulation is so essential. A suitable regulation system established through a cooperative industry spirit designed around an efficient and focused approach is far better than a system imposed from the outside. The Californian system for spray application approval with its mountains of paper work and 48 hour advice periods should frighten any thinking person into realising that if we do nothing then the consequences could be frighteningly expensive and inflexible.

The CITF has no paid employees to perform its tasks and for the mean time will rely on each of its member bodies for secretarial and administrative assistance. The CITF may have to act as a council of Australian cotton industry bodies for the time being. One of its important tasks will be to encourage the openness of discussions within the industry. Under the present operation of the industry it is very difficult for major issues such as industry regulation to be properly discussed and dialogue initiated. Much of the really good discussion takes place in board rooms, individual group meetings or in the paddock. This often leads to information failing to flow through the system

and because of the lack of transparency misunderstandings and suspicions often arise. One alternative is to have the CITF continue the Cross Industry conference which was initiated last year on a biennial basis alternating with the Australian Cotton Conference. This conference would become a clearing house for important but non-urgent issues where well prepared and researched submissions would be forwarded and discussed. Action plans and delegation of resources to deal with the issue would be determined by the CITF.

A fair and open process for bringing issues to the Cross Industry conference is required. Such a system should allow issues to be raised at various levels within the industry. The CITF may assist by developing issue discussion papers utilising the skills of the various CITF members and distributing these to individual growers and all industry groups for consideration. The object would be to have these issues thoroughly discussed within industry associations especially grower associations before they come to the conference. At the cross industry conference the views of individual groups may be either channelled as a separate group view or through a grouping system such as the combined growers association. What ever way the system should be open, balanced and fair, but structured so that individuals can understand the issue, the pertinent points of view and the decision making process. The important point is developing a process of analysing, discussing and developing issues from the grass roots through into a body or council that can act with the confidence of the industry behind it.

On more urgent issues such as a sudden disease outbreak the CITF should have the charter to meet immediately (teleconference) and would be responsible to ensure that the appropriate industry response was enacted.

Until such times as the CITF evolves into a new format or hands industry coordination responsibilities over to some other body it will need to fulfil a facilitating role in annual industry reviews of the strategic plans. These annual plans should operate within the frame work of 5 year strategic plans.

No matter how we organise these industry decision making bodies or how we formulate best practice procedures the final responsibility lies with the individual. The power to give great support to the industry lies within each and every member of the industry. Everyone has to make a contribution otherwise the responsibilities fall on the shoulders of a few and across industry support declines. The future is in your hands!

Conclusion

- The cotton industry needs to develop a shared vision of the future - an image of where it wants to be and how it wants to operate.
- The cotton industry has to work more closely with the community and its neighbours.
- Individuals within the industry have to take greater ownership of the industry problems and be aware of the impacts on other people and the environment.
- While the industry faces many problems its greatest challenges lie in the way it organises its activities and carries out its activities.
- The cotton industry has to develop a better means of internal dialogue and debate setting standards and values on which to base its activities.
- We need to understand the basic culture of the cotton industry establishing why certain practices are not supported and how greater involvement by individuals can be achieved.
- The cotton industry needs to clarify with its grower base why it is important for best practices to be introduced
- The adoption of best management practices will provide the industry

with a clear picture of its responsibilities but it will have to be accompanied by a robust and efficient accreditation and compliance system that is accepted by the industry.

- Strategic planning will assist the coordination of industry organisations.
- The CITF will provide a valuable coordinating role for industry organisations until the industry evolves a more suitable mechanism.
- The partnership between the industry and science is vital for future prosperity.

The road to a more united and focused industry that has greater control of its destiny will not be easy but if the journey is started there is every reason to believe we can reach a future that is a more secure and less threatening than the outlook that exists today. As Machiavelli put it “There is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle than to initiate a new order of things. For the reformer has enemies in all those who would profit by the old order, and only lukewarm defenders in all those who would profit by the new order, this lukewarmness arising partly from their adversaries and partly from the incredulity of mankind, who do not truly believe in anything new until they have had actual experience of it”.

Perhaps our industry will only learn from crisis or as the saying goes “that things will only change when the pain of staying the same is greater than the pain of change”.

Our industry cannot sit idle caught in a situation like the frog in the parable of the boiled frog where the feeling of being comfortable in the slowly warming water blinds the frog to the impending threat. By the time the water gets too hot the frog finds its complacency has lulled it into unconsciousness, unable to escape and eventually it boils to death! We must review our processes and

work towards the future. We have to clarify the end we have in mind, check our culture and begin working towards shared goals with a coordinated approach.

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