

Global Strategy Group

Shanghai, 5-6 December 2005

Agenda

MONDAY, 5 DECEMBER	
12:00-12:15	Welcome
12:15-13:30	Luncheon and session one What is the sustainability of China's growth? The boom in Chinese growth continues, albeit at a slower rate than the last several years. What are the requirements (domestic and international) to sustain this growth? What are the major potential disruptions?
14:00-16.30	Session two Tour de table What do you consider to be the one/two most important risk factors for global geopolitical stability in 2006, and why?
16:30-17:00	Break
17:00-18:45	Session three China and India: The new players in the emerging structural shift China and India have both clearly entered a new phase as emerging players in the global economy, with cooperation as well as conflict between the two countries intensifying in important ways. What is the most positive scenario for the rest of the world for how this relationship evolves? What would be the most worrying development from this standpoint?
19:30-22:30	Dinner and session four Living with a leadership vacuum in the West Chirac is politically dead, as is Bush. No one knows the margin of maneuver Merkel will have. Blair is in a dreadful situation. The vacuum in leadership in the Western world is going to endure for at least two years, given electoral cycles. What could be the implications – geopolitical and geo-economic – of this situation?



TUESDAY, 6 DECEMBER	
08.30-10:00	Session five <i>Could 2006 be the year of reckoning for the global economy?</i> Underneath the reasonably good growth taking place in the global economy are signs that the basis for US growth may be eroding. Monetary readjustment also seems in the cards, as a change of outlook occurs in the financing of the US deficit. What are the scenarios for the global economy in 2006 in this structural perspective?
10:00-10:15	Break
10:15-11:45	Session six <i>The US as an overstretched superpower: Assessing the implications</i> Is the United States becoming a truly overstretched superpower—militarily, economically, and in terms of diplomatic bandwidth? What are the implications of this for US relations with China? For the US's policy in Iraq and the Middle East more generally? For how the US respond to other global challenges?
12:00-13:15	Session seven <i>Globalization confrontations</i> Are there major new backlashes and counter/movements to globalization taking form? More generally, are we entering a period of more confrontational globalization? If yes, what are the implications for business and in terms of a more crisis-prone world?
13:15-14:15	Concluding points over lunch