

## Terms of Reference

# Call for Experts in the field of Foresight and ICT

<b>Title</b>	<b>Call for Experts in the field of Foresight and ICT</b>
Work package Lead:	ZSI – Centre for Social Innovation
Related Work-package:	WP4 – Foresight Methodology & Participation Enhancement
Related Task:	4.2 – Regional Foresight Methodology
Author(s):	ZSI – Centre for Social Innovation, Vienna, Austria
Project Number	SEE/B/0039/1.3/X
Instrument:	South East Europe – Transnational Cooperation Programme
Start date of Project:	1/2011
Duration:	36 months

*Project funded by the European Community under the South East Europe Programme.*

<b>Abstract</b>	<p>The FORSEE project is seeking to sub-contract three external experts to design and draft the <i>Regional Foresight Methodology</i> that will later be implemented on a national level in SEE target countries.</p> <p>FORSEE is looking for a mix of expertise: (1) Foresight methodology, (2) ICT in SEE countries, (3) Foresight coupled with ICT.</p>
-----------------	---

## Table of Contents

1	INTRODUCTION .....	3
1.1	Background.....	3
1.2	Description of the Project Activities.....	3
2	Task Description .....	5
2.1	Description of the Regional Foresight:.....	5
3	REQUIRED OUTPUTS .....	6
3.1	Tasks and activities of the expert team leader and members .....	6
4	EXPERTS PROFILES AND SELECTION CRITERIA .....	8
4.1	Expert profiles.....	8
4.2	Tentative Timeline.....	8
4.3	Application.....	9
4.4	Selection criteria.....	9
4.5	Submission of application.....	9
5	CONTRACTING PROCEDURE AND BUDGET.....	11

# 1 INTRODUCTION

## 1.1 Background

The ‘FORSEE – Regional ICT Foresight exercise for Southeast European countries’ project targets ICT Research, Development and Innovation (RDI) policy reform in the South-eastern Europe (SEE) region, proposing a focused effort on introducing a Foresight culture in the region, which is necessary to accelerate socio-economic growth in participating countries striving to meet the challenges of the global networked economy and to participate on equal footing in the European Research Area. The FORSEE initiative aims to introduce a sustainable mechanism for ICT RDI Foresight in the region, attempting to tackle the absence of a regular process applied for technological future orientation and research policy review.

FORSEE's main objective is to identify the shortcomings of the ICT RDI sector in the region and orchestrate the establishment of a regional collaboration network, working on ICT Foresight and exploring synergies and complementarities between research resources in the target countries. The project's efforts are going to address regional stakeholders in the sector and will provide a participatory platform for collaboration in order to ensure that the outputs will receive wide acceptance and will inspire the necessary sense of regional ownership. One of the most important elements of the project is the hands-on approach in the implementation of pilot ICT Foresight exercises in all participating countries<sup>1</sup> based on a Regional methodology adapted to the region's capacities and resources.

## 1.2 Description of the Project Activities

One of the main objectives of FORSEE is the development of a methodology that will be made available to allow SEE governments to perform national/regional Foresight exercises with the contribution of all stakeholders in an organised and effective manner beyond the span of the project, as a tool for Policy Review in the field of ICT Research, Development and Innovation. Foresight will be introduced through the project to the SEE participating regions as a systematic, participatory, future-intelligence-gathering and medium-to-long-term vision-building process aimed at present-day decisions and mobilising joint actions. The project will address those issues that prevent the SEE countries from successfully identifying national competitive advantages and co-operation opportunities and focus on establishing the basis for open collaboration between governmental organisations, scientific communities, enterprises and civil society in SEE. FORSEE aspires to open an inclusive dialogue of all relevant stakeholders, synthesise views and create a sense of regional ownership of results.

---

<sup>1</sup> Austria, Bulgaria, Greece, Hungary, Romania, Serbia, Slovenia

Implementation of FORSEE activities will include necessary capacity building to perform Foresight exercises in support of competent Ministries/government bodies. FORSEE will endow the SEE region with an appropriate Foresight methodology, a concrete framework for co-operation among stakeholders and governments at national and transnational level, policy and capacity building recommendations and a regional innovation and entrepreneurship enhancement strategy roadmap.

FORSEE aims to highlight transnational collaboration opportunities in ICT research and innovation, and identify complementarities that the SEE countries could exploit in order to make better use of their limited resources in funds and expertise under a regional planning process. The participatory spirit that will be employed will provide a sense of transparency and stimulate participation of all stakeholders in the innovation process, thus increasing investment and creating business opportunities.

Ultimately, FORSEE aspires to embed a foresight culture in the SEE region. The implementation of a regional Foresight exercise will provide regional stakeholders with adequate tools, resources and a process that will be applicable regularly in the future to enable them to anticipate trends and developments, to join forces with their neighbours to compete in the global environment, to bridge the local/regional industry and academia and to make better use of scientific resources while responding to strategic national/regional needs. It is, therefore, envisaged that Foresight exercises will become an integral part of the policy-making process in the region (which is not the case today).

FORSEE concludes with the implementation of the regional Foresight methodology on a national level in the target countries, the presentation of the results of this Foresight exercise at a regional conference, and the establishment of a virtual *Regional Foresight Centre* based on the knowledge generated by the project.

## 2 Task Description

The project has identified the key stakeholders to participate in a Foresight exercise in each target country<sup>2</sup>. The main stakeholder groups are policy-makers and implementers, research units, the business community, and civil society organisations.

The project is currently producing a synthesis (*green paper*) of analyses of each target country's national innovation system (NIS), including SWOT and PESTLE (Political, Economic, Social, Technological, Legal, and Environmental) analyses. This *green paper* will serve as a vital input for the design of the *Regional Foresight Methodology*. The methodology shall have a built-in evaluation.

The FORSEE project is seeking a team of experts to design and draft the Regional Foresight Methodology, which will be implemented at national level in each target country. The expert team consists of a team leader and two team members.

### 2.1 Description of the Regional Foresight:

During the last two decades, the interest in Regional Foresight has risen sharply. Both globalisation and the continuing expansion of the EU have contributed to this development, mainly due to smaller countries re-thinking their own position in the political and economic landscape. Among SEE countries in particular, a new regional perspective has emerged in terms of RTDI collaboration. The resulting greater capacity of the region enables them to better compete in the global economy.

One of the most important elements of the project is the hands-on approach in the implementation of pilot ICT Foresight exercises in all target countries, based on a *Regional Foresight Methodology* adapted to the region's capacities and resources. By doing so, the project acknowledges that significant savings of resources can be achieved, coupled by the strong collaboration potential that such an approach will ensure.

---

<sup>2</sup> Austria, Bulgaria, Greece, Hungary, Romania, Serbia, Slovenia

### 3 REQUIRED OUTPUTS

Expected results of this engagement is the drafting of two or three different versions of a *Regional Foresight Methodology* to be later implemented in the field of ICT at national level in South East European Countries (SEE).

The *FORSEE Foresight group* will include:

1. The *expert team* selected by the international selection committee:
  - Expert 1 (team leader): profile in developing Foresight methodologies
  - Expert 2 (team member): profile in ICT in South East European Countries (SEE)
  - Expert 3 (team member): profile in Foresight and ICT
2. *Representatives of the FORSEE project members*
3. *FORSEE Foresight Task Force* (a regional task force consisting of national teams who later accompany the implementation of the national Foresight exercises)

The *expert team* will be responsible for drafting the *Regional Foresight Methodology* and the process leading to it. Representatives of the FORSEE project members will participate in the process, especially in the planned workshops. The proposed versions of the *Regional Foresight Methodology* may be scrutinised by the *FORSEE Foresight Task Force*.

#### 3.1 Tasks and activities of the expert team leader and members

The *expert team* will be briefed by *FORSEE project members* and receive the *green paper* (regional synthesis of analyses of NIS (national innovation systems)), which they will use as a basis for their further work.

The *expert team leader* assumes the overall responsibility of designing and drafting the *Regional Foresight Methodology*, guiding the *expert team* and FORSEE project members through the process.

Based on the insights gained from the preparatory stage, the team leader, with the support of the team members, prepares a short briefing paper for the whole FORSEE Foresight group on the methodology process.

The *expert team leader and members*, together with FORSEE project members will meet in Vienna for a workshop on Foresight methods to be used in the *Regional Foresight Methodology*, which will later be implemented in national Foresight exercises.

Based on the result of this workshop, the *expert team leader* will prepare the results of the first workshop – and, if necessary, complement them with additional material – as input for a follow-up workshop. S/he will circulate this input paper among the members of the *FORSEE Foresight group*.

The team leader and members, together with FORSEE project members will meet in Vienna for a follow-up workshop to refine the Foresight methods to be used in the *Regional Foresight Methodology*.

The *expert team leader*, together with the team members, then prepares a draft of two or three different versions of a *Regional Foresight Methodology* to be sent for review to the *FORSEE Foresight group*. The *expert team leader* will timely accommodate the feedback received.

The *expert team leader* will present the different versions of the Regional Foresight Methodology at the final workshop attached to the next FORSEE project meeting (May 2012) and facilitate the discussions with the FORSEE consortium to select the most appropriate version of the Methodology.

Possible necessary modifications arising from the above workshop will be accommodated by the expert team leader who then will compile the final version of the Regional Foresight Methodology.

**The effort expected by each expert to fulfil her/his duty and cover the above activities/tasks is around 7 work days for each *expert team member*, and around 9 work days for the *expert team leader*.**

## 4 EXPERTS PROFILES AND SELECTION CRITERIA

### 4.1 Expert profiles

Under this call, three external experts will be selected by an international selection committee (see 4.4):

- Expert 1 (team leader): profile in developing Foresight methodologies
- Expert 2 (team member): profile in ICT in South East European Countries (SEE)
- Expert 3 (team member): profile in Foresight and ICT

#### ***General requirements and professional experience***

Expert 1, team leader, has senior experience in Foresight methodology at the highest level (minimum of 10 years of experience, evidenced by the CV and information about contact persons for obtaining references and comprehensive list of reference projects).

Expert 2, team member, should be a senior expert in ICT and has a thorough overview of recent ICT developments – globally in general and in SEE in particular. (This expert has a minimum of 10 years of experience, evidenced by the CV and information about contact persons for obtaining references and comprehensive list of reference projects.)

Expert 3, team member, has solid experience in Foresight and extensive experience in ICT on the international level (minimum of 5 years of experience, evidenced by the CV and information about contact persons for obtaining references and comprehensive list of reference projects).

The applicant must not be employed by one of the FORSEE consortium partners!

### 4.2 Tentative Timeline

- The expert team will be recruited by mid-February and will be operative until mid-May 2012.
- Preparatory stage (preparation of the short briefing paper by the expert team) – Mid February – mid March 2012 (expert team)
- Workshop on Foresight methods in Vienna – second half of March 2012 (expert team)
- Follow-up workshop in Vienna – first half of April 2012 (expert team)
- Regional Foresight Methodology workshop with FORSEE project members at project meeting in Slovenia – May 2012 (expert team leader)

Estimated dates and places are subject to change.

### 4.3 Application

Applications for the position of the expert team leader or member shall include the following documents:

- a cover letter/e-mail with a short description of the motivation
- a CV, highlighting relevant experience, reference projects, and a list of publications
- binding cost calculation indicating the number of days (see estimation on previous page, last paragraph) and the daily rate (per diems for each travel day, incl. accommodation, have to be included in the daily rate!)<sup>3</sup>

Interested experts are not required to apply as a team. Each position will be appointed separately.

### 4.4 Selection criteria

The expert team leader and members will be selected by the following criteria:

- 50 % professional experience evidenced by the CV and the publication list
- 30 % reference projects evidenced by the reference projects
- 20 % costs (evidenced by the daily rate and the number of days) (quantity structure of costs)

An *international selection committee* will be convened to select the team leader and two team members for the expert team. The selection committee will consist of representatives of the following organisations:

- University of Patras, Greece
- Ministry of Higher Education, Science and Technology, Slovenia
- Centre for Social Innovation, Austria

### 4.5 Submission of application

Please submit the required documents for the application as:

---

<sup>3</sup> The applicant should also indicate a rough estimation about the travel costs (only economy air fare and 2nd class train fare). Eligible travel costs will be covered by the project upon delivery of original invoices. The travel costs will not be considered in the selection process in order to allow equal conditions for participations from experts from different countries and regions.

- *“Expert 1 (team leader) Expertise in developing Foresight Methodologies”*
- *“Expert 2 (team member) ICT Expertise in South East European Countries (SEE)”*
- *“Expert 3 (team member) Expertise in Foresight and ICT”*

Per e-mail to: Gorazd Weiss, [weiss@zsi.at](mailto:weiss@zsi.at)

Centre for Social Innovation (ZSI), Austria

**Deadline** for the submission of an application is **Friday, February 10, 2012** (date of entry of the e-mail). Any application received after the deadline will not be considered.

The contractor reserves the right not to place any order. Costs for necessary document preparation by the Applicants to this call will not be reimbursed. This call is not subject to the conditions of the Austrian Public Procurement Law.

## 5 CONTRACTING PROCEDURE AND BUDGET

The selected experts

- Expert 1 (team leader): Profile in developing Foresight methodologies
- Expert 2 (team member): Profile in ICT in South East European Countries (SEE)
- Expert 3 (team member): Profile in Foresight and ICT

will be informed on the results of the selection procedure around **15 February 2012**. The contract with the selected experts will be established by ZSI (Centre for Social Innovation), as representative of the FORSEE project, shortly after the selection of the experts.

As indicated above, the duration of the contract will be ca. 3 months, from mid-February to mid-May 2012.