HORIZONS **FORESIGHT** METHOD

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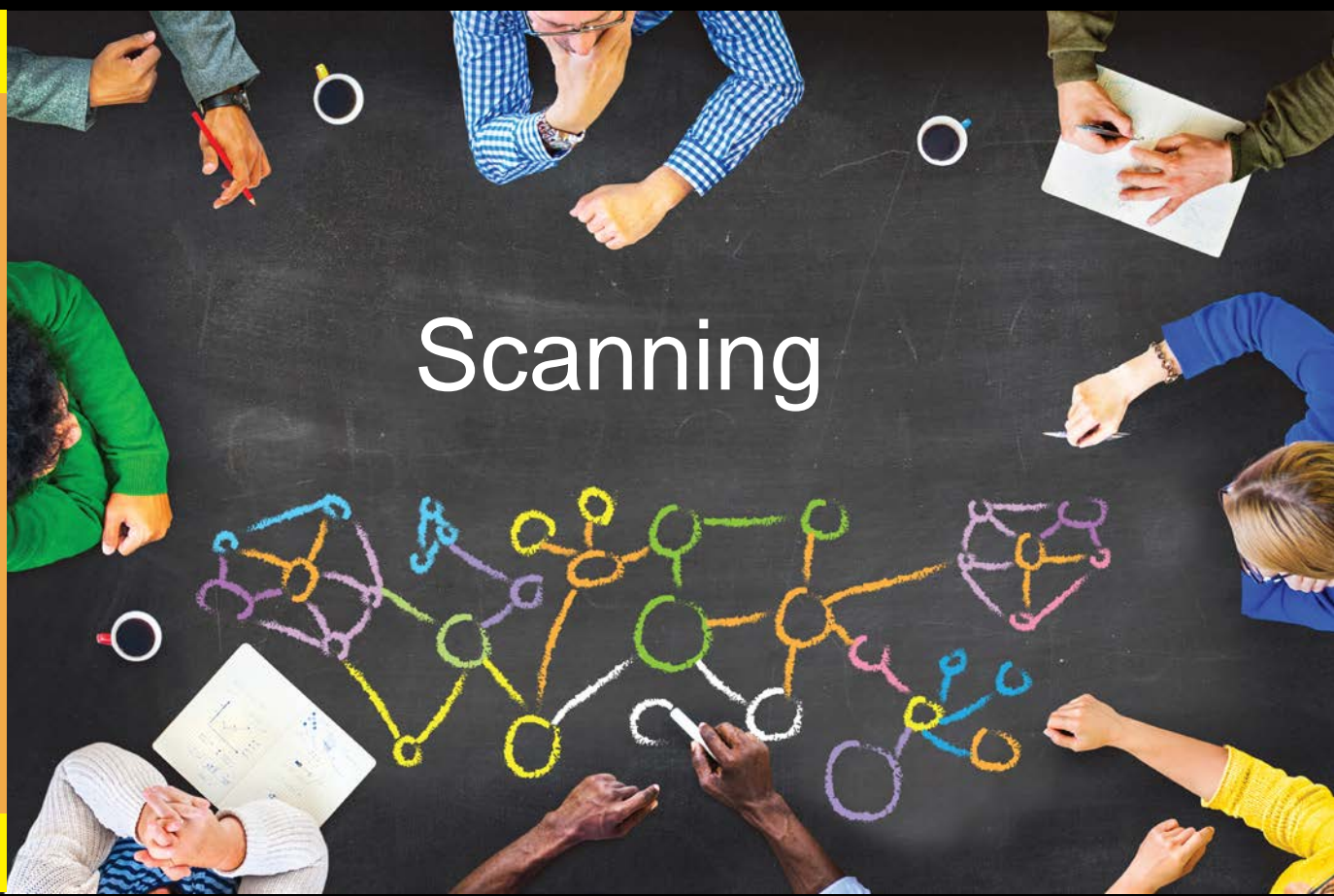
Scanning

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THE HORIZONS FORESIGHT METHOD

FRAMING
- Identify the issue or problem of interest
- Consider the larger system(s) shaping the issue
- Prepare a simple domain diagram of what is "in" or "out" as a guide Allow it to evolve over the study

ASSUMPTIONS
- Identify "current assumptions" buried in public dialogue and policy documents
- Identify key trends people assume are true
- Summarize key assumptions as a description of the expected future

You are here in the Horizons Foresight Method

SCANNING
- Scan for weak signals of potentially disruptive changes
- Conduct interviews and facilitate dialogue to understand the system and develop insights

SYSTEM MAPPING
- Identify key elements or nodes in the system
- Describe key relationships
- Use a system map to identify where change could occur and direct further scanning for weak signals as needed

CHANGE DRIVERS
- Use insights from scanning to identify change drivers shaping the system
- Do cascade diagrams to see 2nd to 5th order consequences

SCENARIOS
- Develop scenarios to explore a range of futures
- Identify potential challenges and discontinuities
- Test robustness of current assumptions and strategies

RESULTS
- Explore policy challenges and opportunities
- Identify credible assumptions and robust strategies
- Identify key uncertainties, surprises and emerging issues
- Better understand how the system or issue could evolve

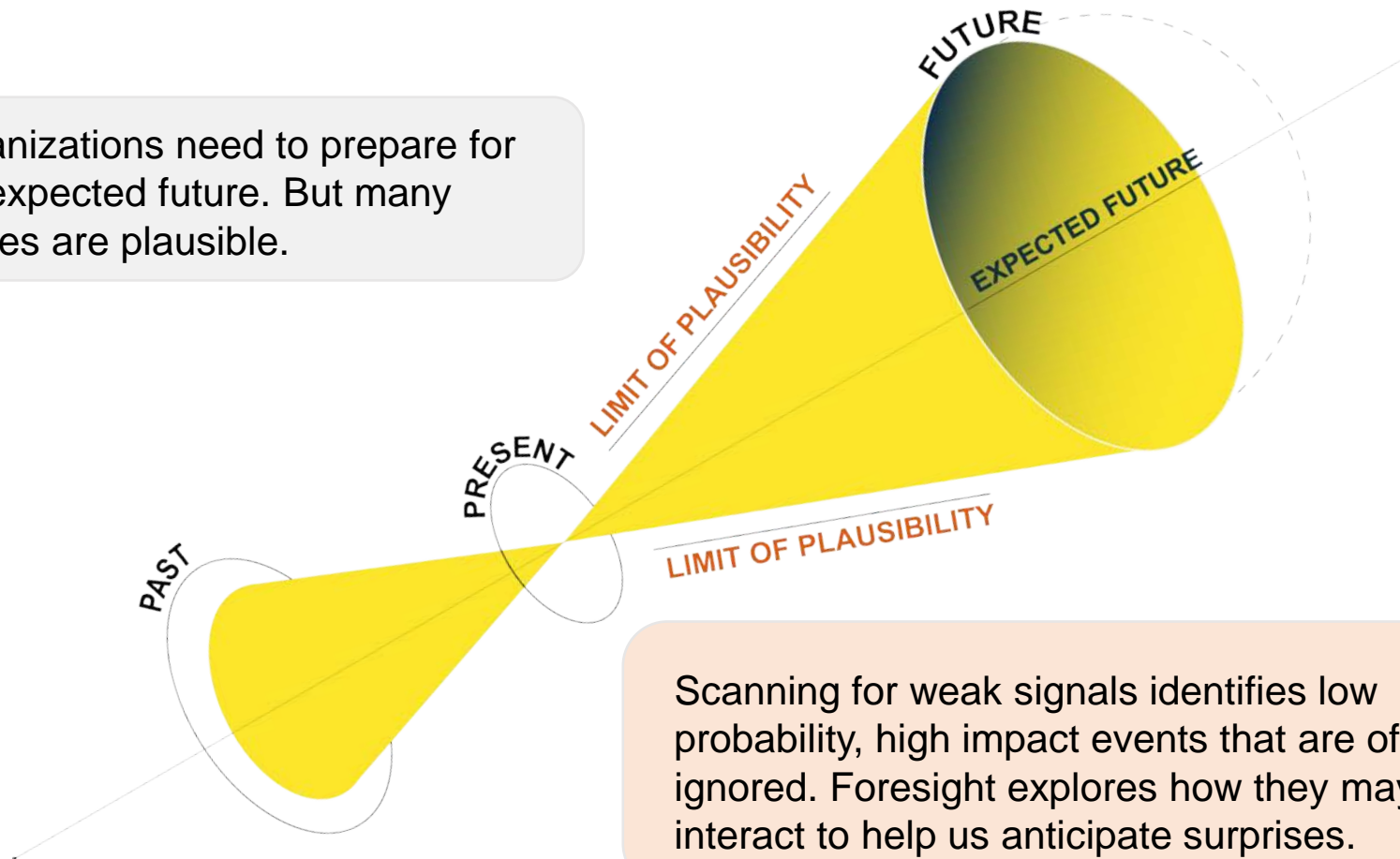Module
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LEARNING OBJECTIVES

- Understand why and how to scan in foresight

- Understand how scanning is used in the Horizons Foresight Method

THE PURPOSE OF SCANNING

- Thoughtful scanning is the foundation of foresight.

- Scanning is the process of gathering information from a range of sources to:
  - **better understand the system** and the factors that may shape it
  - **identify weak signals** that may lead to significant change
  - **build evidence** to use at each step in the foresight process

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LOOK BEYOND THE EXPECTED FUTURE

Organizations need to prepare for the expected future. But many futures are plausible.

FUTURE

EXPECTED FUTURE

LIMIT OF PLAUSIBILITY

PRESENT

PAST

LIMIT OF PLAUSIBILITY

Scanning for weak signals identifies low probability, high impact events that are often ignored. Foresight explores how they may interact to help us anticipate surprises.

Adapted from Original: Charles Taylor, Army War College

WHEN TO SCAN

- Scanning happens at different phases of the foresight process:

  - **Beginning:** broad scanning to understand the system

  - **Middle:** more focused scanning to understand what is changing

  - **End:** specific scanning to find evidence to support or challenge the elements of the foresight study

WHAT TO SCAN FOR

Weak signal: a sign that a *disruptive* change could be underway.

- 1 or 2 incidents or data points indicating that a change could be starting or underway and that it could be significant for the system under study
- Examples:
  - Russia wants to expand energy infrastructure and sales to China
 - Russia is building new special economic zones to expand ties to the far east

Insight: *inference* that fundamental change is or could be underway; *how* it could generate structural or system-level change and *why* it could be significant for the system.

- Weak signals or expert opinions support the insight
- Example: Russian geo-economic strategy is shifting to Asia

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CHARACTERISTICS OF USEFUL WEAK SIGNALS AND INSIGHTS

- **Significant** – it could cause significant, disruptive change to occur in the system if it happens.

- **Novel** – it is new to the audience or has not been factored into their thinking yet.

- **Plausible** – it is possible to describe one or more pathways through which it could change the system.

- **Timely** – it is likely to occur within the timeframe of the study.
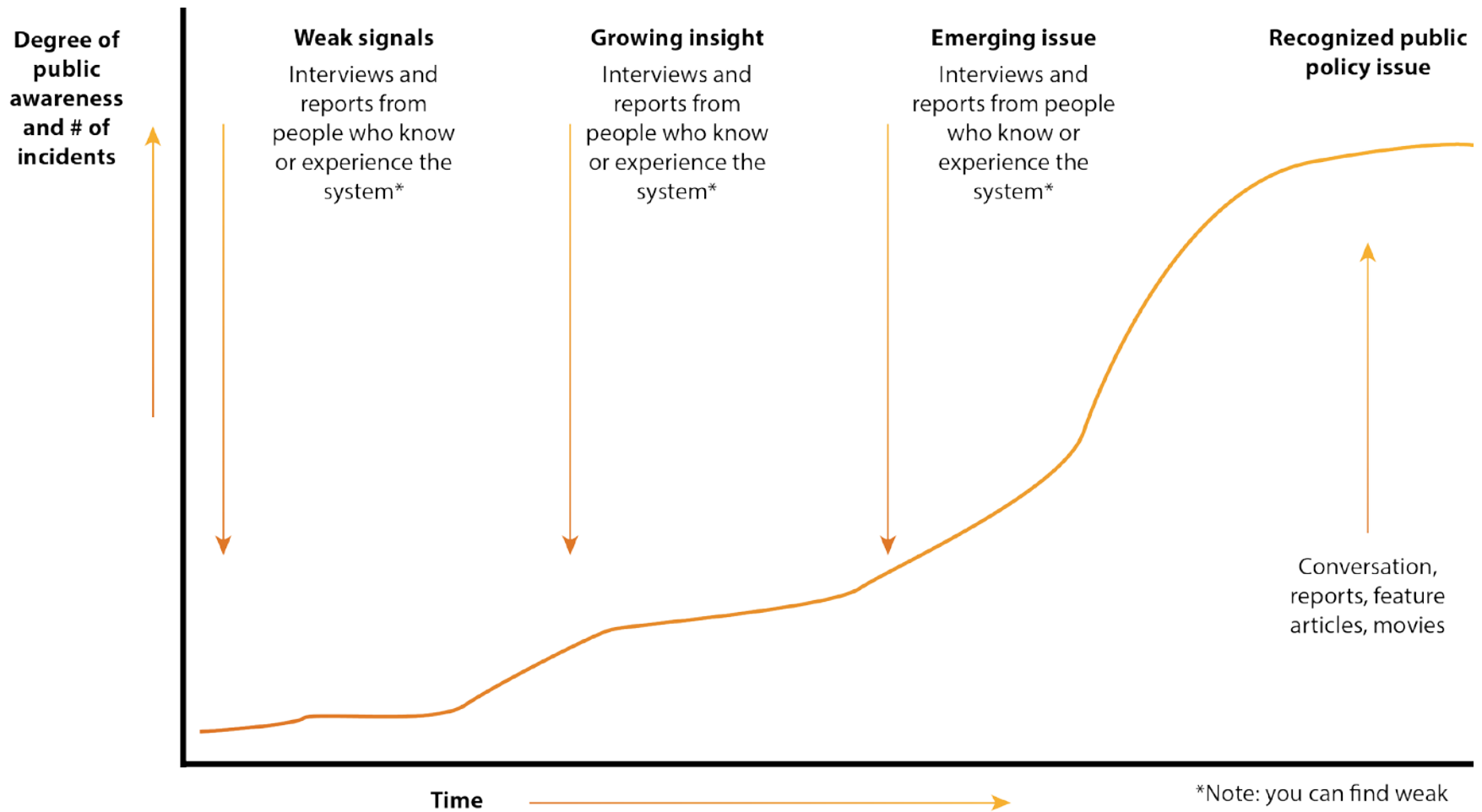
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BUILDING AN INSIGHT

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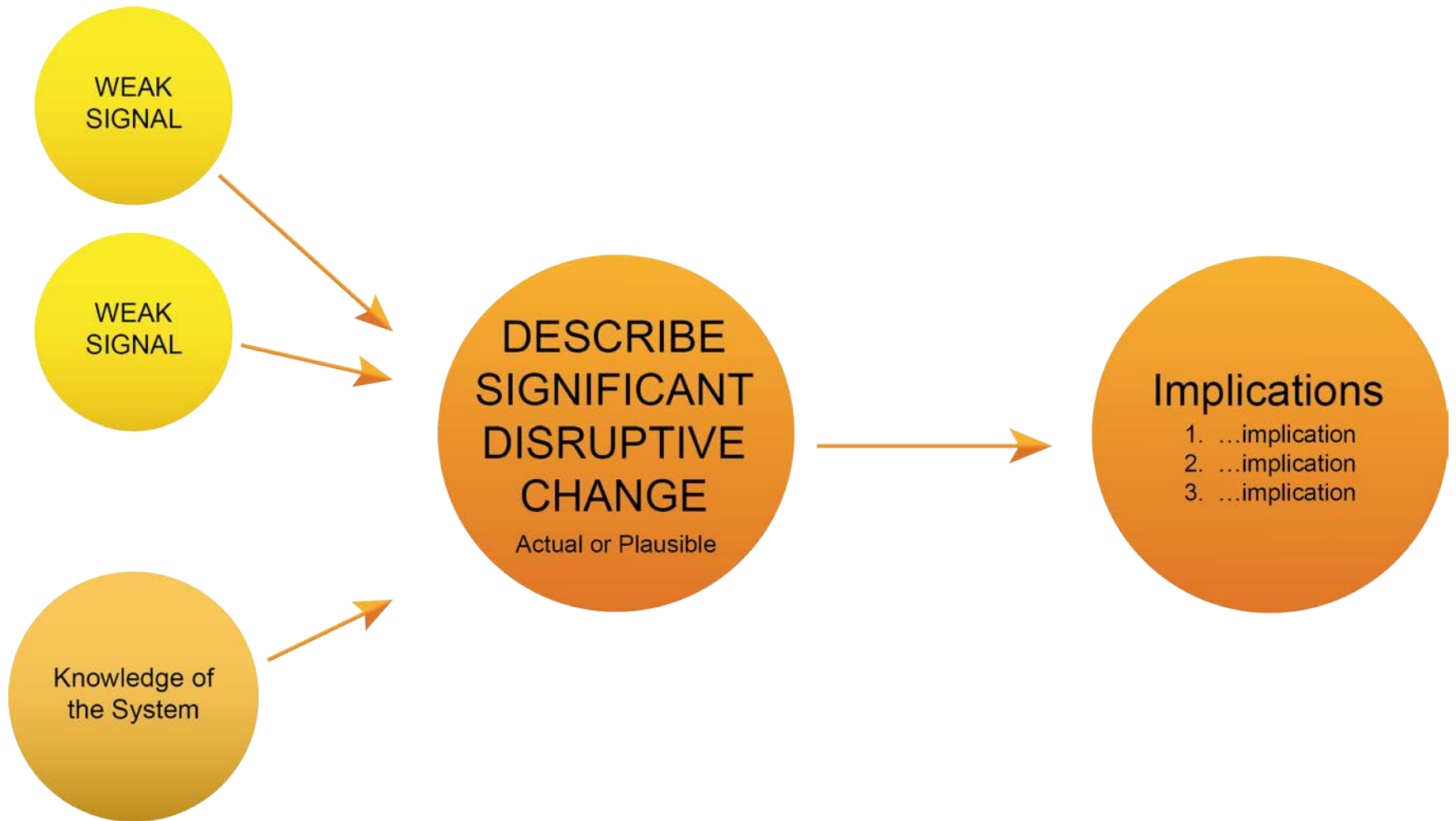
HOW TO SCAN

- Interview knowledgeable people, engage in insightful discussions, listen to media (e.g. Ted Talks), read (reports, books, news, social media).

- Surprise comes from unexpected areas. Scanners should look beyond their system at issues not directly related to their subject.

- Scanning can be organized into a taxonomy that works for the scanner (e.g. STEEG – social, technological, economic, environmental and governance issues).

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WHERE TO SCAN

Degree of public awareness and # of incidents

Weak signals

Interviews and reports from people who know or experience the system*

Growing insight

Interviews and reports from people who know or experience the system*

Emerging issue

Interviews and reports from people who know or experience the system*

Recognized public policy issue

Conversation, reports, feature articles, movies

Time

*Note: you can find weak signals in many places.

Adapted from work by Graham Molitor, Wendy Schultz, Everett Rogers.

ROLE OF THE SCANNER

- Identify and clarify what is changing or new in the system.

- Distill the key or useful information from primary sources, wherever they may be:

  – Don't warehouse information or bring dozens of documents to the table.

  – The goal is to be as succinct and strategic as possible.

- Value is added by extracting the salient points, facts, data sources and graphics to enable others to gather the gist of the source without having to sift through tons of information.

  – Some documents contain many weak signals and insights. Pull out the key ones.

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WHY HORIZONS IS CAUTIOUS ABOUT TRENDS

Definition: A trend is a long-term, continuous change

The concept of trend does not have a large role in the Horizons Foresight Method for three reasons:

- People take the concept very casually. Everything is a trend or trending. It is hard to distinguish the significant from the fad.

- A significant trend has a lot of data to support it. It is probably well known and has already been factored into decision-making. It can help define the expected future.

- Calling something a trend seems to give the statement undue importance. At a practical level, it can be difficult for a group to see beyond the seeming certainty of data. At a time when the underlying system is transforming most trends are also changing and uncertain, as a result **all trends should be treated as assumptions**.

Horizons systematically examines a "trend" and treats it as a weak signal, insight or driver - if it has a strategically useful impact on the system.

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SCANNING TOOLS AND RESOURCES

Scanning databases:

- Shaping Tomorrow, Trend Watching, Fast Company, McKinsey Insights
- Social media – Twitter, YouTube
- Major news services – NY Times, Financial Times, The Economist, etc.

Tools for organizing and gathering insights:

- Pearl Trees - http://www.pearltrees.com/
- Paperli - http://paper.li/
- Flipboard - www.flipboard.com

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INFORMATION

Policy Horizons Canada

Horizons de politiques Canada

www.horizons.gc.ca