

The EUFORIA project

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Rationale and objectives

The European Knowledge Society Foresight project (Euforia) was launched by the European Foundation for the Improvement of Working and Living Conditions (Eurofound) in the context of its four-year work programme, 'Analysing and Anticipating Change to Support Socio-Economic Progress 2001-2004'. EUFORIA lasted from 2002-2003. The purpose of the project was to increase understanding of the 'drivers' of a KS and to anticipate their potential impacts on living conditions, working conditions and industrial relations. The underlying aim was 'to identify and support paths to positive transformation while avoiding unsatisfactory development paths'. In this framework the EUFORIA objectives included - To identify and analyse the 'drivers' of the Knowledge Society in order to increase understanding of the transformation from the Industrial Society to the Knowledge Society. - To anticipate the wide range of transformation, which the Knowledge Society brings in order to analyse the impacts of the Knowledge Society on living conditions, working conditions and industrial relations. - To help decision-makers to identify and support paths to positive transformation whilst avoiding unsatisfactory development paths.

The design phase

EUFORIA was a 'developmental' project for the Eurofound and was intended to have a number of parallel features. It had to be integrative (considering all three areas of interest: living conditions, working conditions and industrial relations); explorative (exploring new ideas, new issues, new methods, and be creative); experimental (applying different working and analysing methods); and forward looking.

Euforia intended to provide insights into European developments leading toward a KS. Given that there is no single version of a KS being developed at European level, the approach of case studies was applied for studying KS 'related developments at national level. Thus, the starting point for Euforia was to choose a small set of countries that represented very different points on the spread of EU Member States along key advancement indicators.

An early selection was made on the basis of a preliminary set of indicators described for the SIBIS project (<http://www.sibis-eu.org/sibis/>). From this, it was possible to select two countries that appeared to be at the extremes of development and one in a roughly average position. The three countries chosen were Finland (high on most indicators), Germany (occupying a roughly average position within the EU on most indicators) and Greece (relatively underdeveloped on most indicators). Each case study had to apply small 'scale foresight exercises

flowing guidelines and advice from the coordinator and the same basic steps. Yet, flexibility was also possible to adopt processes and methods to local peculiarities.

The needs of the client were reflected in the Terms of Reference to which the consortium responded proposing the EUFORIA approach described below. During the conduct of the project, there was also continuous communication between the client and the Coordinator as well as the partners as was necessary. In this way common understanding of the needs and management of expectations was kept stable.

Management structure

Eurofound awarded the EUFORIA project to a consortium of organisations via an open tender. The project was coordinated and led by PREST at the University of Manchester, and the process was jointly managed with project partners in Finland (FFRC), Germany (Empirica) and Greece (Atlantis). The three latter organisations were responsible for the conduct of the foresight pilot in their countries.

For the conduct of the foresight pilot in each country a temporary national foresight centre was created i.e. a group of around 5 experts in the fields examined by Euforia (living and working conditions and industrial relations) to provide advice and support throughout the project. In more detail the national foresight centre members provided assistance and advice for the organisation of the two workshops and the identifications of the relevant experts to invite to each of them; the identification of the major trends characterising national development; the development of specific scenarios about a possible course of the specific country to a Knowledge Society; the definition of country-specific statements for the Delphi survey; the identification of experts to invite to participate in the Delphi survey, and the dissemination of the Euforia results at national / European level.

Apart from the Eurofound (the client), EUFORIA was monitored and provided advice by an Advisory Committee set up by the Eurofound within the context of their four-year work programme, Analysing and Anticipating Change to Support Socio-Economic Progress 2001-2004.

The key activities and methods of EUFORIA

The key elements of EUFORIA were as follows.

1. The KS advancement indicators (for the European countries, the US and Japan) involved several rounds of elaboration of the initial set of advancement indicators produced by Empirica. In addition to dialogue among the partners, and feedback from national workshops, a series of Advisory Committee and other meetings suggested alternative indicators that might be used; different ways of presenting the results; and requirements for explicating national circumstances. The indicators work provided a key empirical basis on which the subsequent discussions in the workshops and the empirical part of the scenario development were based.
2. The cross-national workshop. The opportunity was taken of building more interactive foresight processes into a conference on EUFORIA (and related topics). In this workshop, methods of small-group working were employed to gain a preliminary assessment of major drivers of a European KS, and the associated impacts on Living Conditions, Working Conditions and Industrial Relations.
3. The national workshops. Two rounds of national workshops were held, giving six workshops in all. National experts were involved in these. Both considered indicator data and the interpretation to be given to national characteristics. The first set of workshops also reflected especially on drivers and shapers of KS, and made proposals as to useful Delphi questions. The second set of workshops was able to make some use of preliminary Delphi results, and concentrated especially on developing scenarios for the KS in the respective countries. The National workshops indicated different possibilities of the KS development in the pilot countries. They also

illuminated new organisational forms that allow for new ways of generating and mobilising knowledge.

4. The KS Delphi Study. An online Delphi study was launched, in the three national languages (as well as in English), and taken through two rounds. This covered a range of topics concerning the KS developed through discussion at national workshops, among the teams, and with Eurofound. The Delphi statements consisted of 32 cross-national statements and 5 country-specific statements. These statements covered the social, technological, economic, environmental, political and values-related aspects (STEEP) and were clustered into six categories: governance and mobility, health and privacy, industrial relations, living conditions; sustainable development, and working conditions. Results of the Delphi were used as input for the discussions at the national scenario workshops as well as to prepare a full Delphi-based scenario.

5. Scenario development and analysis. The scenarios were developed from the application of various foresight methods providing outcome of a consistent and critical analysis of some of present and emerging drivers/trends in European societies (STEEP framework).

The country scenarios were put in the context of wider scenarios referring to the global situation, the EU-15 and the EU KS levels. These wider context scenarios were developed by the coordinator and suggested to the national foresight centres to use as context for the pilot country scenarios. The use of these three levels enabled the specific pilot country scenarios to be placed in the context of wider events that would impact upon them, following the principle of nested scenarios.

The national centres in the pilot countries were left free to make as much or as little use of the recommendations as it was important to observe how local cultures influenced the development of their individual scenarios. The scenarios developed show optional ways of how the future may look like in Finland, Germany and Greece, aiming at specifying necessary policy implications, social innovations and roles of key players to achieve them.

In total, ten foresight methods were used in the project. The 'soft' ones: environmental scanning, cross-national workshop, brainstorming, (STEEP: Social, Technological, Economic, Ecological, Political Issues), national panels, SWOT analysis, prioritization, Delphi survey, scenarios, and the 'hard' methods: performance indicators, and critical influence analysis (CIA).

Approaching participation

The approach to participation varied across the different groups formed. The members of the national foresight centres (NFC) combined expertise in the areas of interest (living and working conditions and industrial relations) as well as various policy fields and foresight. The people invited to the workshops covered a broader range of expertise (foresight practices, sociology, economy, human resources, research policy, public policy, trade unions, industrial associations, NGOs) but participation was again oriented to people having the expertise required by the study rather than wider public.

The members of the national foresight centres were selected due to their positions in key organisations. As an example, in the Greek case, the national foresight centre included representatives of the General Secretariat of Research and Technology, the Confederation of Workers, the Industrialists' Association, and people from academia. Participants to the workshops were identified through the team's personal contacts and the knowledge of the NFC members. Participants were approached by phone and invitations sent by e-mail. Special attention was paid to give the name of the person who suggested the potential participant as personal contacts matter significantly in Greece.

Outcomes, dissemination and impact

The Euforia project outputs consist of:

- comparative statistical analysis on the development of a KS based on conceptual and indicator analysis of various dimensions of KS;
- preparation and analysis of a Delphi study appraising KS potentials for the EU and its member states;
- analysis of the evolution of KS in the three selected countries, based on national foresight workshops - and preceded by a cross-national workshop - examining 'drivers of the knowledge society';
- reports based on further foresight workshops in these countries, considering alternative scenarios of KS development and their implications for living conditions, working conditions and industrial relations;
- the EUFORIA synthesis report.

The project discovers that foresight and its methods have roles to play in the emergence of a KS. Foresight procedures can be designed and implemented that will inform policy development and debate ? and this will inform policy action so as to help shape the KS.

EUFORIA went further than a typical technology foresight, since it is designed to inform a wide range of policies relevant to social and organisational innovation, as well as technological innovation. In Europe, institutions and practices must rise to the challenges of social change in general (e.g. demographic change, globalisation, etc.) as well as to change associated with the production and use of new knowledge. The study indicated various points at which social innovation seems to be particularly problematic - for instance, the work-life balance emerged as a recurrent source of concern, there were problems seen in the adaptability of trade unions, the much-heralded network organisations were felt to be slow in developing, ethical considerations were not expected to take a prominent role in working life, and so on. Social innovations, and the social forces to develop, diffuse and implement them, were clearly called for.

The EUFORIA results were disseminated during the Irish presidency EU conference 'Foresight for Innovation - thinking and debating the future: shaping and aligning policies' (14-15 June 2004, Dublin). Further dissemination activities were carried out by the Eurofound at EU level.

Separately, dissemination activities were also carried out in the three pilot countries. Specifically in Greece, The EUFORIA initiative in Greece was fortunate to run in parallel with the National Technology Foresight Programme. Although different in scope and orientation, this managed to raise interest in the use of foresight exercises among the members of various 'expert' communities. The decision to use the National Foresight Programme scenarios as one set of inputs for the EUFORIA scenarios and to include in the national EUFORIA expert team, people directly involved in the National Programme, resulted in achieving substantial synergies between the two programmes and increasing the impact of EUFORIA. The EUFORIA report for Greece was presented at two different points in time at workshops organized under the national foresight programme and it was taken into consideration as part of the basic documentation prepared for two new 'horizontal' working groups in the National Foresight Programme ? 'Science and Society' and 'e-Governance'. The EUFORIA results were also presented at the final national conference of the national programme. Despite the limited scale and pilot character of EUFORIA it was interesting to see that the trends and the drivers noted as well as the policy implications identified were significantly similar to those highlighted in the national foresight programme. Furthermore, the most desirable scenario 'Awakening' shared the same generic and structural features with the most desired scenario that the national programme produced ('Garden?'). This verified that the EUFORIA foresight processes worked well despite the limited time and resources available (2002-2003 and with 34,800 € budget for the Greek case).

Euforia managed to raise awareness and interest on KS concerns in various EU countries. It inspired the Eurofound to produce a general model for national KS foresights and adopt foresight methodology as a part of its research strategy. In addition, in 2005, a report 'Ireland and the knowledge society' outlined the steps taken in Euforia that could be used to inform an Irish KS project and options for further development of KSF were explored in the Irish context. EUFORIA further influenced the 2004 discussions on the KS strategy of the Finnish Parliament, and motivated KS-related research in New Member States.

The Euforia developed methods have been applied in other European foresight, e.g. FISTERA, while the Euforia results were used as inputs for foresight and other strategic policy intelligence processes, and projects (e.g. RegStrat). They additionally inspired further research at PhD level in Greece, and Germany.

The impact from EUFORIA extended beyond Europe as it stimulated KS initiatives at the academic & public sectors in Latin America. The Euforia's online Delphi structure and platform was used by PhD researchers in the UK and governmental authorities in Latin America to design other studies.

Lessons learned

EUFORIA was not intended to be a comprehensive Foresight study but a pilot application of Foresight approaches to the concerns of the Eurofound conducted in the light of some perceived core KS developments believed to be central issues for the EU, as indicated by the Lisbon and Barcelona summits.

EUFORIA revealed that foresight processes and methods should be adjusted to local conditions and 'mentalities'. On-line methods have considerable potential in foresight, but access to them is very unevenly developed. Electronic methods cannot at present substitute for face-to-face contacts required in certain foresight processes. The Delphi experience suggested that contact going beyond email was necessary to recruit substantial numbers of respondents for such a study. One possibility would be to establish national pools of people with expertise on specific topics, who would be committed to taking part in such a survey.

The effort to bring foresight to bear on the problems of a KS requires more than a simple emulation of the specific approaches applied in technology foresight. The nature of expertise; the ways of recruiting and motivating support; the ability of people to think in a prospective manner; are all matters that need particular consideration. However, it is valuable to link KS foresight activities to other foresight activities, including Technology Foresight, like the Greek case showed especially where these have sponsorship from national authorities.

Cross-national Foresight studies face various challenges, not least those of co-ordinating translation, a major problem for the Delphi and of determining sets of topics and even methodologies that are understood and accorded significance in similar ways in different societies. More emphasis on initial training is needed in this sort of project, involving the sponsor as well as the national foresight centres. Developing consensus around a well-structured project plan allowing also flexibility to adapt to local circumstances is also crucial.

EUFORIA demonstrated clearly the value of workshops for deepening the analysis of a KS by adding qualitative depth to the quantitative indicators; suggesting topics and issues not covered in indicator analyses; and casting light on different national paths to a KS. Despite advances in IT systems, there is limited scope for replacing them at present by electronic communications. However, there is considerable scope for using decision support tools that allow for capture of content and enhancement of face-to-face meetings. In addition, having suitable background material is a very valuable stimulus to discussion. Furthermore, trying to achieve multiple objectives in one workshop should be avoided.

Foresight methods can also help build networks and constituencies that can play roles in effecting change, and implementing the results and recommendations of the work. Such network-building was a less central element of EUFORIA but should be considered when designing future projects.

Some more lessons coming from the Greek case study referred to achieving the required participation, achieving commitment of policy-makers and impact on policy-making.

Even if more people were targeted to avoid missing specific expertise at the workshops the result was not as satisfying. A reason for this might have been that the sponsor of EUFORIA was not the Greek state, in which case experts from employees? and employers? organisations would be more motivated to have their voice heard. This must have affected the interest and commitment of the policy world.

Another reason for not achieving the envisaged participation at the national workshops might have been the still limited critical mass in Greece of experts combining foresight knowledge and expertise in areas like living conditions, working conditions and industrial relations as well as the several workshops of the National Technology Foresight Programme running in parallel with EUFORIA. Additionally, the necessary ?foresight? culture in the policy-making process was absent in the Greek case and the critical mass of foresight experts needed was only then being created.

The best experience and greatest benefit of EUFORIA

EUFORIA showed that foresight and its methods have roles to play in the emergence of a KS. Foresight procedures can be designed and implemented that will inform policy development and debate. Policy action will help shape the KS, and foresight provides an opportunity to reflect on just what sort of KS we are constructing.

EUFORIA belongs to a new generation of foresight exercises going beyond the technology field to address wider and more generic socio-economic issues that might well be of a cross-national nature. This new perspective in the implementation of foresight generated new insight about broader types of impacts that foresight processes and methods could have, for instance on knowledge production, collective learning, actors? alignment, active public engagement, etc. This inspired the PhD research of the author of the present narrative, which focused on developing an impact assessment framework for the contribution of foresight towards more participatory knowledge societies.

External links

- EUFORIA Synthesis Report, <http://www.eurofound.europa.eu/pubdocs/2004/04/en/1/ef0404en.pdf>
- EFMN Brief 50 Knowledge Society Foresight <http://www.efmn.info/>
- EFMN Brief 57, Greece?s Path to the European Knowledge Society <http://www.efmn.info/>
- EFMN Brief 59, Knowledge Society in Germany 2015 <http://www.efmn.info/>