National Planning, the Big Picture and Horizon Scanning

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A situation assessment, which serves as the basis for strategic planning on various national issues, includes a situation report, whether officially drafted or intuitively understood by decision-makers. The situation assessment is a thought framework to help the organization understand the challenges and opportunities it faces, and its strengths and weaknesses.[2]

As part of the globalization process, the world is characterized by rapid technological developments and unprecedented connectivity and linkage between people, geographic regions and themes. This aspect of the global system poses challenges to decision-makers and those concerned with strategic planning. These challenges involve dealing with a complex reality, **uncertainty**, ambiguity and changes taking place at a dizzying pace. (This is described in the world of management as VUCA[3]). This reality leads to routine **surprises** in the various spheres of life, which on the state level could lead to crises in national systems.

In order to address the effects of the modern global system and its increasing complexity, national decision-makers (government ministries) are required to be familiar with and understand the **big picture**. The big global picture is made up of trends, mega-trends, phenomena and convergences between trends that in turn create new trends and phenomena. The mega-trends are the chief designers of human reality. Familiarity with the big picture provides decision-makers with a broader, cross-disciplinary context, for them to understand and incorporate when analyzing variables that can shape the various systems (thematic/geographic) they are responsible for.

Noted mega-trends include, for example, the accelerating pace of technological change (including the digital revolution), global warming, deforestation, demographic changes, the shift of the center of economic gravity from the West to the East, political multipolarity and globalization. The mega-trends allow us to extrapolate trends that point in a clear developmental direction on a specific topic (for example, increased droughts as a derivative of climate change) and phenomena, i.e. the way the trends are repeatedly manifested (for example, depletion of water sources as a phenomenon deriving from increased droughts).

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[3] VUCA stands for Volatility, Uncertainty, Complexity and Ambiguity. This acronym was coined by the US military, but has been coopted by management discourse. The concept is now commonly used in the term *VUCA world*, to describe the reality we live in as one that is characterized by intrinsic uncertainty, and therefore requires preparation and management methods that are different from those that were developed in a more stable and systematic world. Source: https://doalogue.co.il/wiki/VUCA [in Hebrew].

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The convergence of various trends creates new trends, like global warming, which is causing ice to melt at the poles, combined with technological developments that enable access to natural resources in the deep oceans, contribute to competition and nations fighting over the poles.

New big trends, derived from the mega-trends and their convergences, currently include, inter alia, the uprising against globalization, the race for supremacy between world powers and countries (in several specific fields, such as AI, quantum computing, and control of space, trade routes and the poles) and the blue revolution (a rise in the importance of the sea due to an increase in its potential uses).

A situation assessment, which serves as the basis for strategic planning on various national issues, includes a situation report, whether officially formulated or intuitively understood by decision makers. The situation assessment is a thought framework that helps the organization understand the challenges and opportunities it faces, and its strengths and weaknesses. In the situation assessment process, which serves as the basis for strategic decisions, those who formulate an organizational situation report, as well as its components, are usually limited to the organization's field of operations, and a large part of the assessment is formulated bottom up, from the actual work. Professional delimitation and learning from problems and challenges encountered in the work increase the managers' sense of certainty regarding the situation report and what is needed, as they base it on phenomena and real cases experienced in the organization, with a professional understanding of the field of the organization's operations. These are the components that comprise the situation report relevant to the discipline.

A disciplinary situation report formulated in this way and used for the strategic plan has three inherent assessment failings:

- Phenomena might have occurred before the situation report was formulated, but over time, it might become evident that they did not continue, or they petered out, as opposed to the assumed continuity in the situation report.
- Components that might have been perceived as important may prove, in hindsight, to be limited events with no continuity, and their systemic importance was lower than evaluated.
- Phenomena may have been identified and continued to occur and develop, but in hindsight there was a lack of understanding regarding their causes and continuity.

Such failings in the situation assessment lead to a gap that grows over time between the relevance of the decision and plan made at the end of the assessment, as well as a gap between the plan and the challenges in reality. These gaps could also trigger surprises, some of which could be fundamental, i.e. events that were not prepared for and that could cause great disruption to the organization or its expected output, and some of which could be situational, i.e. disrupting events that can be contained by the organization's strength, albeit at a higher price than planned for.

In order to reduce the chances for crises and surprises for the organization, a strategic situation assessment in every national field must include an understanding of the big picture,

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the intrinsic characteristics of which include knowledge in areas that are not normally in the organization's scope, while addressing the connections between the big picture and the organization's situation report for the discipline, with an emphasis on the way trends affect the field in which the situation report is being formulated. The combination of the big picture (bird's eye view) and the situation report (view from the ground) will facilitate forward-looking planning that will reduce the probability for failings in the situation assessment that are the result of a lack of understanding of the broader strategic environment beyond the field of operation, with a link to and a translation into the challenges of reality in the discipline.

In light of increasing global connectivity and the fast pace of change, the working assumptions in the situation assessment regarding the situation report and the forecast for the future require us to continually examine whether new trends are emerging that would require readdressing and reexamination. A state's leadership, for the most part, wants stable knowledge, understandings, policies and behavior, stability of the state and society and stable relationships with the outside world, that is, a strategy that will hold up in the long term. Any clash with a changing reality makes it harder for these leaderships.[4]

One of the methods developed to deal with the changing reality is horizon scanning. The horizon scanning is a mechanism (or process) for systematically searching, locating and identifying early signs of significant potential developments. These could be weak signs (or initial signs), trends, developments, chronic problems, risks and threats, including matters that are at the margins of current fields of thought and interest, which challenge contemporary assumptions. The horizon examined by the scan could have varying durations (short-, medium- or long-term). The objective of the scan is to help government decide whether it is optimally prepared for future opportunities or threats, and to ensure that the various types of policies that it formulates are durable and flexible, in order to deal with diverse future environments.[5]

About 30 months ago, the Israeli Ministry of Intelligence started the process to establish a national mechanism for horizon scanning, similar to the mechanisms already in existence in various other developed countries that practice horizon scanning (the UK, Canada, Singapore, Australia, Japan, the EU and others). The mechanism in Israel currently includes the Horizon Forum, whose members are representatives from planning and research bodies in all the intelligence and security authorities and from most civil government ministries and it convenes every two months.

[4] Dov Tamari, "From Intelligence for Deterrence to Intelligence for Understanding," *Mabat Malam, Journal of Intelligence and Security*, 84, August 2019 [in Hebrew]. The writer also wrote in the paper that "Israeli governments do not develop organized information, they are not designed to do so and they do not aspire to do so. We focus on the problems that bother us and not on the environment in which they develop or the movement from the past to the present, and into the future. We have a hard time understanding that we are living in a period in which changes occur not over a span of years, but sometimes over only a few days."

[5] Noam Alon, "Scanning the Horizon: A Process to Help Decision Making Processes at the National Level," Intelligence Heritage Center, The Institute for Research into Intelligence Methodology, July 2018 [in Hebrew]. The definition of the objectives is based on the EU and Britain's definition for the horizon scanning process.

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The heart of the horizon scanning mechanism, which is already producing results despite still being developed and formally established, will include a research desk composed of researchers and data scientists, and will utilize advanced technology based on machine learning using big data. The desk will gather all the information transferred by the Forum's member ministries and bodies and from horizon scanning counterparts from around the world, combine it with the information produced in independent horizon scanning processes and will use sense-making methodology on all the information. The desk will produce insights and foresights, which will be distributed to all Forum ministries and bodies for implementation (together with the desk members) in national strategic planning processes and to help decision-making. The desk will also develop, implement and assimilate methodologies for studying trends, and will develop mutual ties with horizon scanning mechanisms around the world.

As part of the government's efforts to address the spread of the coronavirus pandemic, the horizon scanning mechanism has been operating very dynamically from its start in order to monitor the world in various spheres of life and the ways other governments are coping with the virus. The insights from the intelligence mechanism (collection, including that based on foreign relations, research and technology for utilizing big data) have been presented in dozens of research papers, presentations and discussions in governmental working teams, with a large portion of the findings being formulated at the request of various government ministries. This was done in order to plan and make decisions regarding steps for coping with the virus, to establish an exit strategy and to prepare for a possible second wave of morbidity. It should be noted that the Horizon Forum also had a Zoom meeting in order to ensure that all the members were on the same page with regard to the big picture in terms of morbidity and how to address it, geopolitics, society and economics, and to present the relevant technological instruments developed in the Ministry of Intelligence's lab, build models, run simulations and draft possible scenarios for strategic planning.

The horizon scanning mechanism in Israel is meant to be a platform and the national center for a broad political-defense and civil (economic, environmental, social and technological) view on the big picture of global trends and their offshoots, thinking about the future in national strategic contexts and early detection of emerging trends, for the sake of strategic deterrence, decision-making processes and preparedness.

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