

Strategic Assessment Methodology

to define national research and innovation priorities in the context of
establishing AI²

Maria do Rosário Partidário

Why this assessment?

Object of assessment and decision problem

01

Object of the strategic assessment

- Budget allocation to the R&D areas, strategic domains and the Innovation Promotion Unit (UPI).
- Definition of the strategic domains of AI2, which may include specific subdomains.

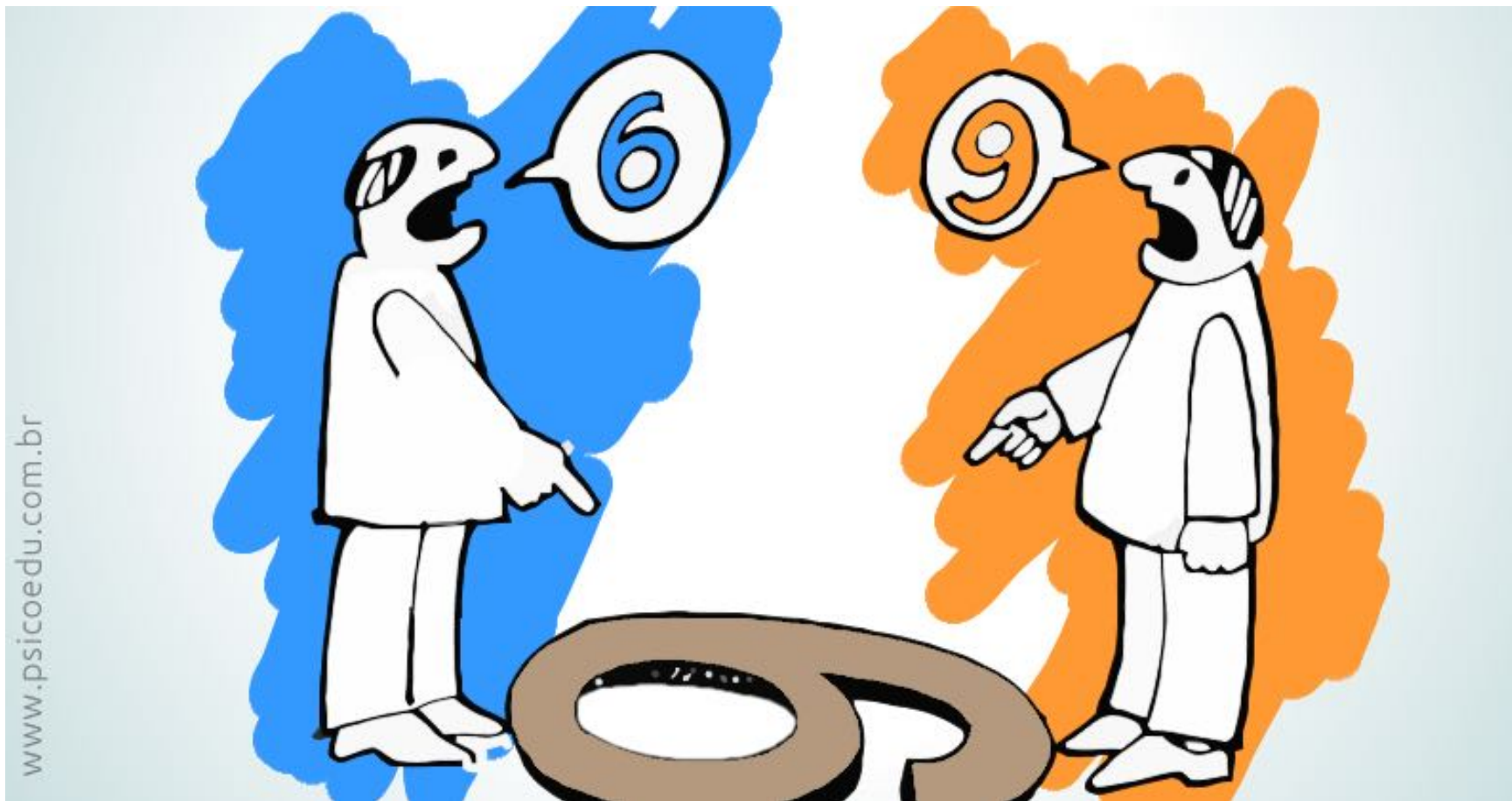


Decision problem

1. What percentage of the budget should be allocated to R&D areas, strategic domains and the UPI?
2. How many and which strategic domains should be included in the programme contract to be signed between the Government and AI²?
3. How should the budget be allocated across strategic domains?
4. How should the budget be allocated across R&D areas?



Multi-level and multi-perspective



Acknowledgements (inputs/support)

02

Monitoring Committee

on the design and implementation of the strategic assessment methodology

- Ricardo Reis (London School of Economics) coordination
- Ana Casaca (European Innovation Council)
- Evelyn Wang (Massachusetts Institute of Technology)
- Fernanda Leite (University of Texas at Austin)
- Gonçalo Quadros (Critical Software SA)
- José Fonseca Moura (Carnegie Mellon University)
- Luis Portela (Fundação Bial)



Working Group to conduct an analysis of the national research and innovation ecosystem

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Luís Loures – President of CCISP

José Francisco Rodrigues – President of the Academy of Sciences of Lisbon

Pedro Bizarro - CTO of Feedzai

Jorge Portugal – Diretor of COTEC



Inputs to the strategic assessment methodology



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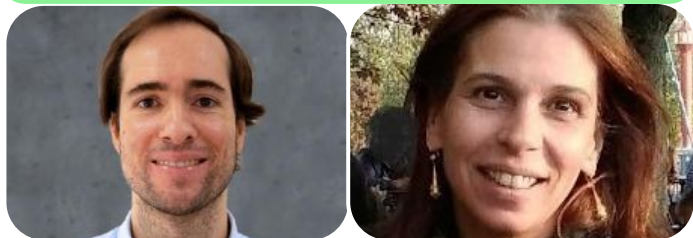
Project team

MRP+NJN+PLANAPP+FCT+ANI+DGEPA+DGE

03

Coordinators of key themes

Societal challenges and R&I needs



Artur Santoalha (ANI)

Marta Norton (FCT)

R&D areas



Bruno Béu (FCT)

Sofia Azevedo (ANI)

Funding model and sources



Bruno Béu (FCT)

João Ribau (ANI)

Pedro Leite (FCT)

Governance and R&I ecosystem



Bruno Béu (FCT)

Cristina Leandro (ANI)

Relationship research and innovation



António Santos (FCT)

João Ferreira (ANI)

Scientific and technological infrastructures and employment



Daniel Carapau (FCT)

Marisa Borges (ANI)



Methodological elements

04

Methodological elements

1. Strategic anchors
2. Context of the assessment
3. Key themes
4. Strategic assessment framework (Critical Decision Factors + assessment criteria + indicators)
5. Strategic options
6. Active engagement of actors



Strategic anchors

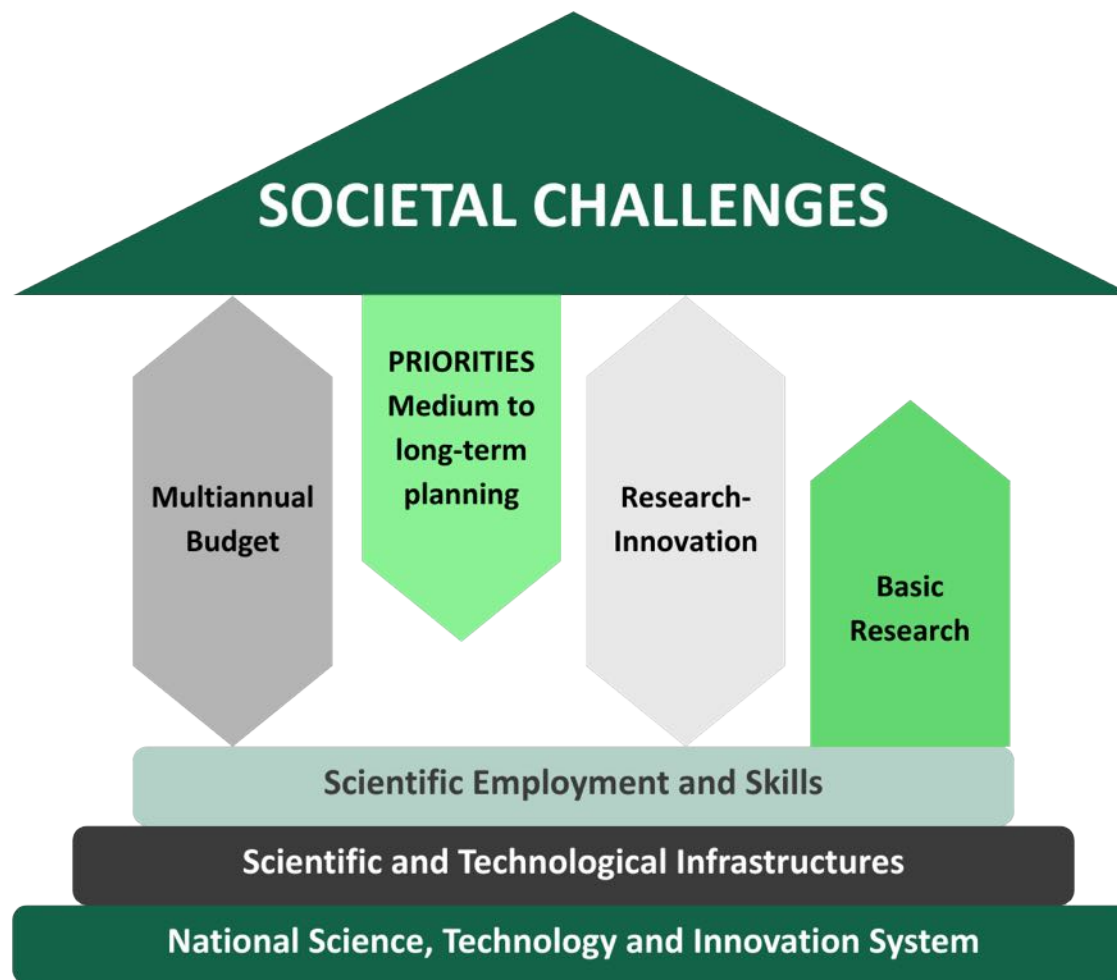
Objective, Vision, Principles and Pillars

Vision for 2050

*Portugal asserts itself as a country that **creates talent and knowledge and transforms them into economic, social, cultural and environmental value**, with a dynamic research and innovation system, interconnected through **national and international networks, competitive and oriented towards excellence**, and combining a sustainable and inclusive development model that strengthens its position in Europe and worldwide.*



Strategic pillars



Context of the assessment

Macro-policies (Strategic Reference Framework) – long term direction

Governance Framework – responsibilities, synergies, conflicts, gaps

6 Key themes

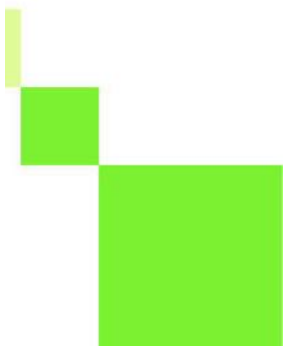
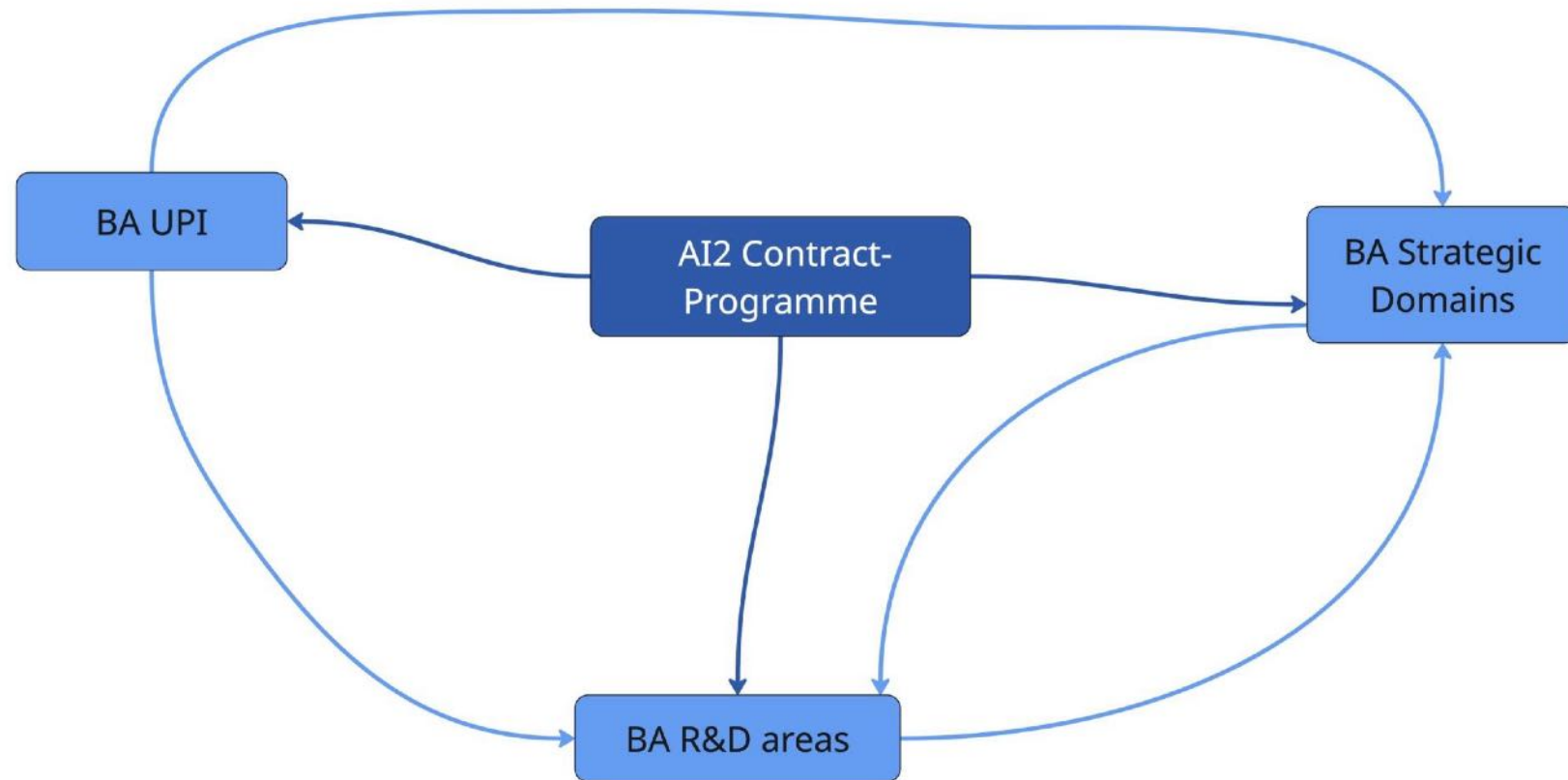
Boundaries of the strategic assessment

Key themes

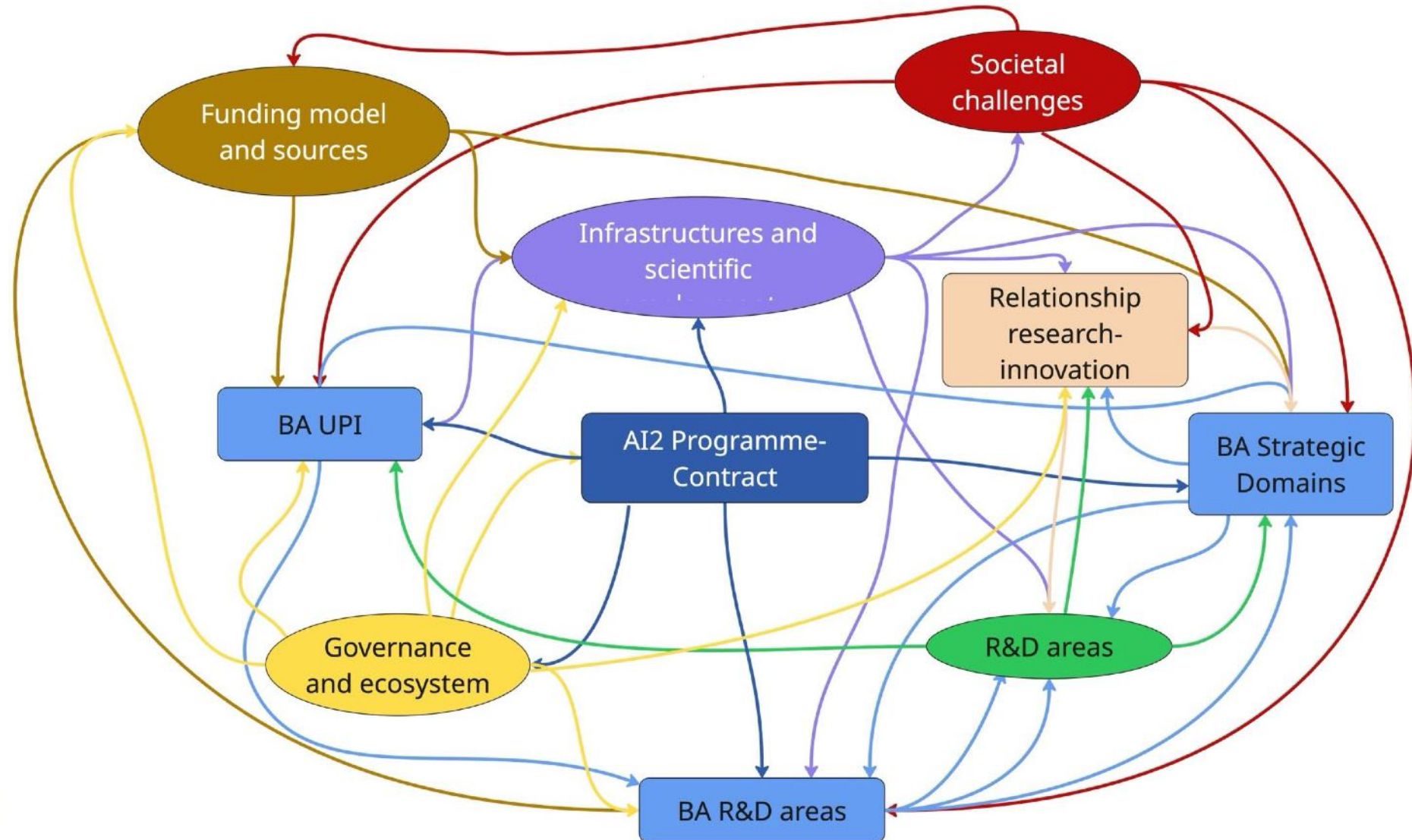
1. Societal challenges and research and innovation needs
2. Governance and the research and innovation ecosystem
3. Funding model and sources
4. Relationship between research and innovation
5. R&D areas
6. Scientific and technological infrastructures and employment



Systemic link within the decision problem

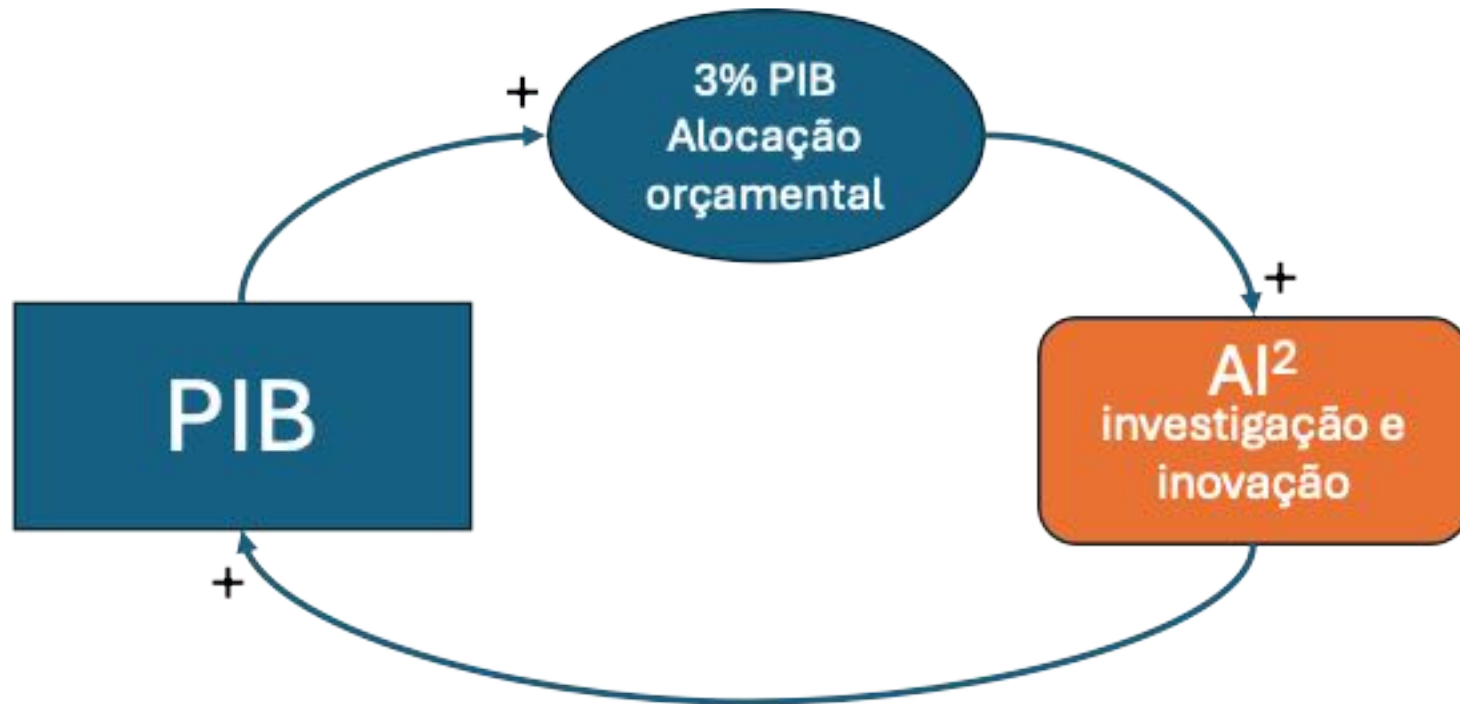


Systemic link between the decision problem and the key themes



Budget for research and innovation

to sustain the virtuous cycle between GDP and R&D investment



Participation and engagement strategy

Dialogues

Types of dialogues

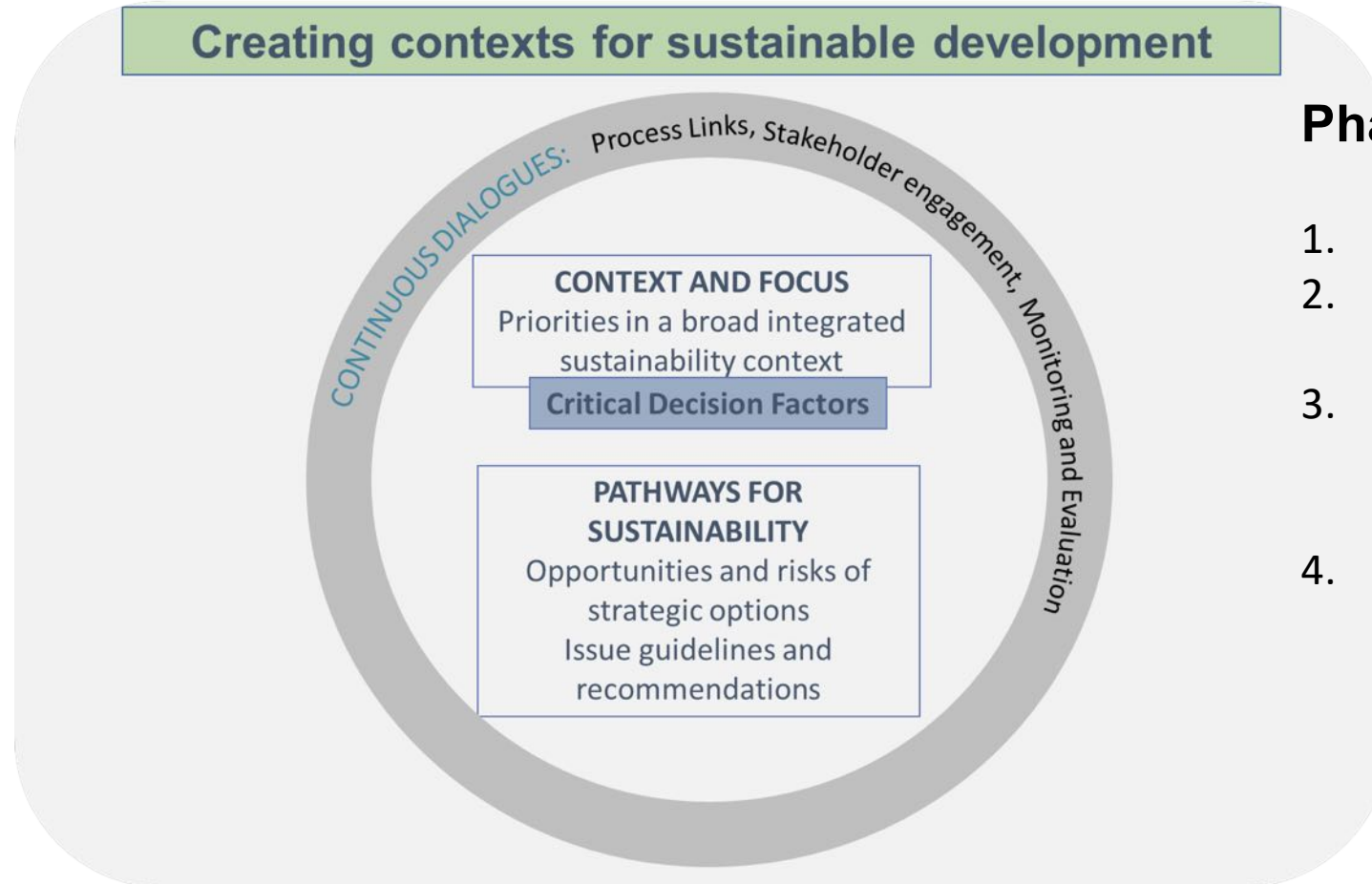
1. Website (continuous)
2. Interactive participatory platform (Consider iT) (continuous)
3. Meetings with entities (march)
4. Decentralised workshops (focus and options) (may to july)
5. Thematic roundtables (march to october)
6. Conferences (february and october)
7. Bottom-up initiatives (conferences, inputs on topics; issue papers)



Methodological phases

05

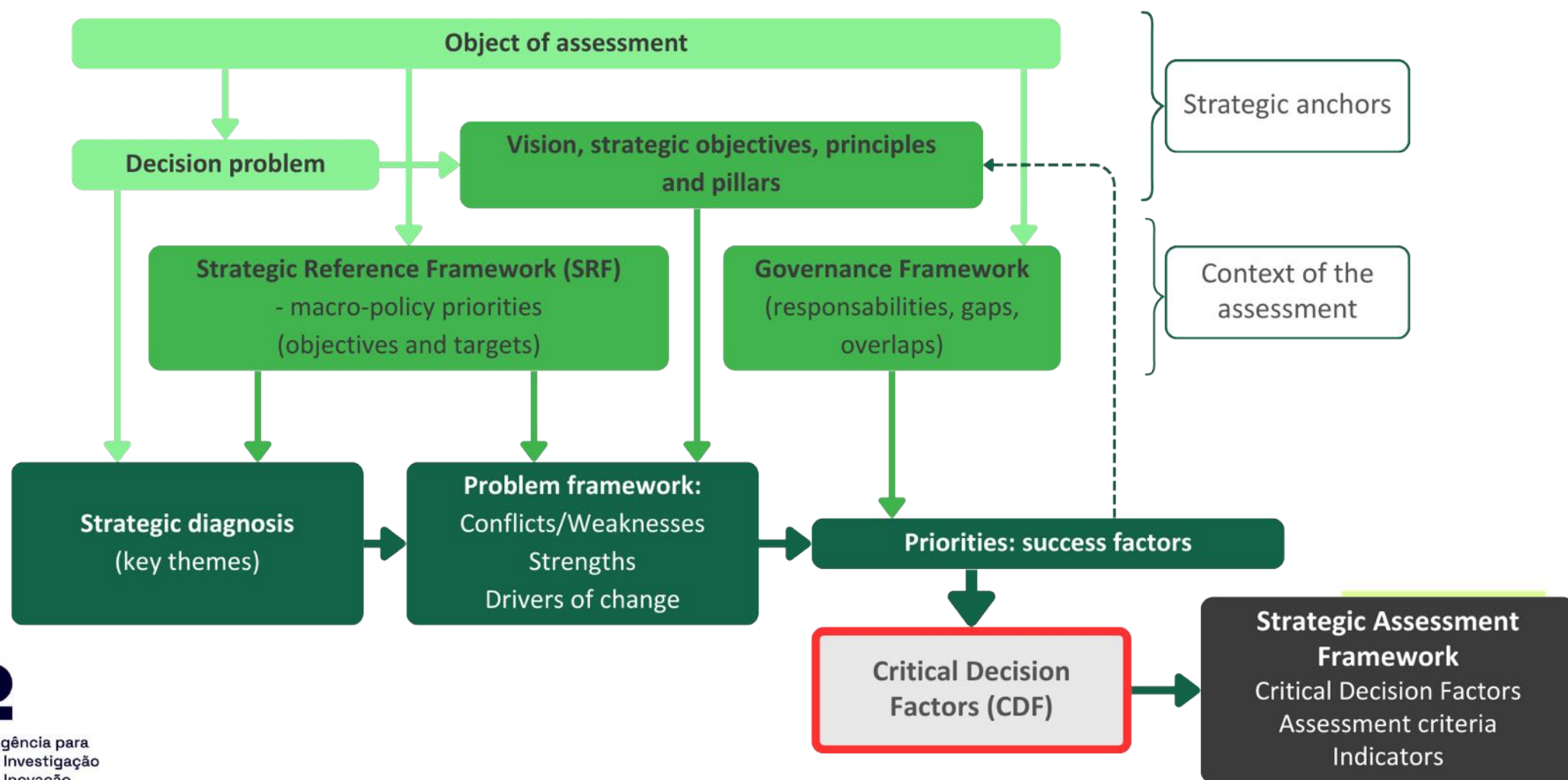
ST4S Methodology – Strategic Thinking for Sustainability



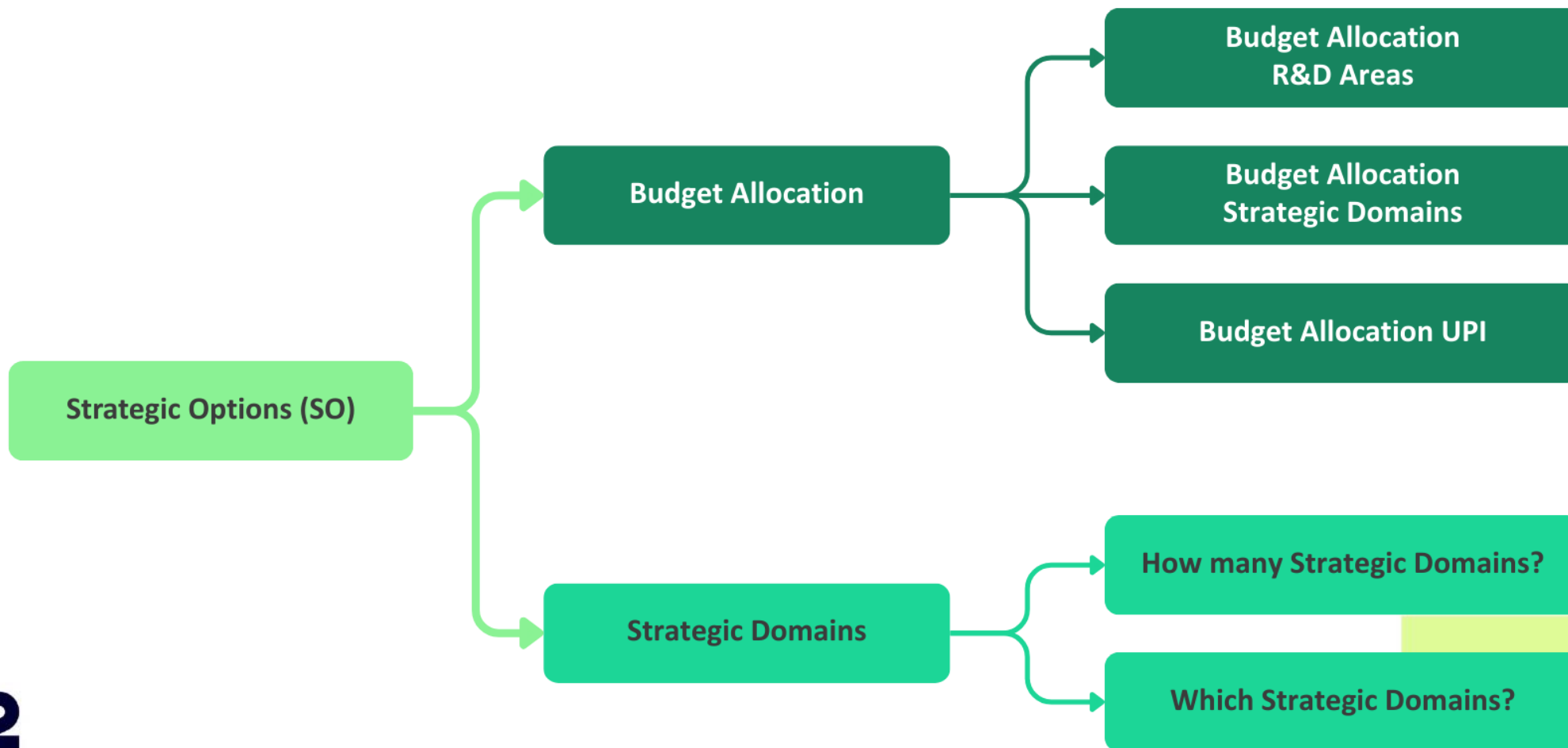
Phases

1. Strategic focus
2. Identification of Strategic Options
3. Assessment of Opportunities and Risks of Strategic Options
4. Monitorisation and ex-post evaluation

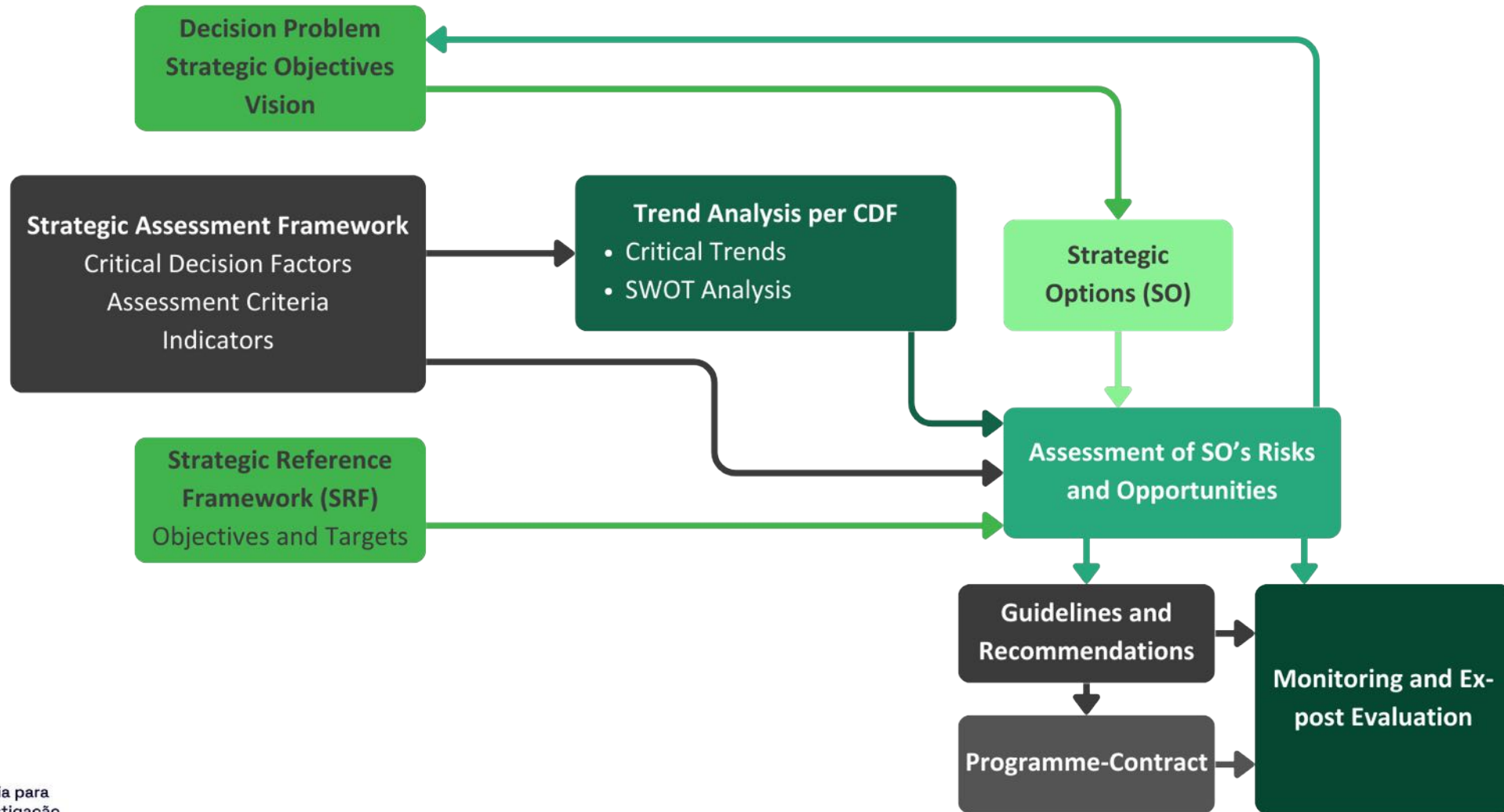
Phase 1: Strategic Focus



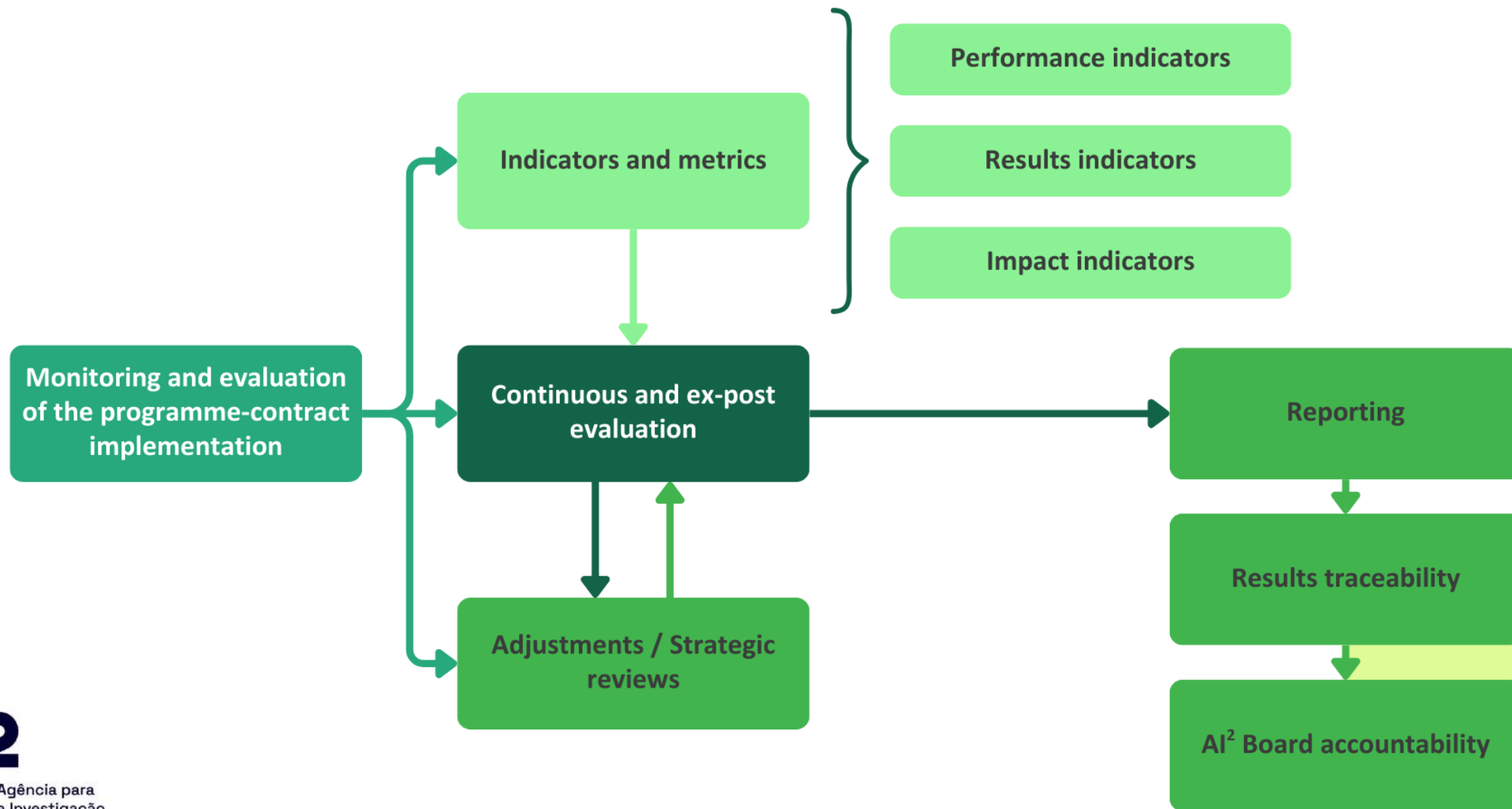
Phase 2: Strategic Options



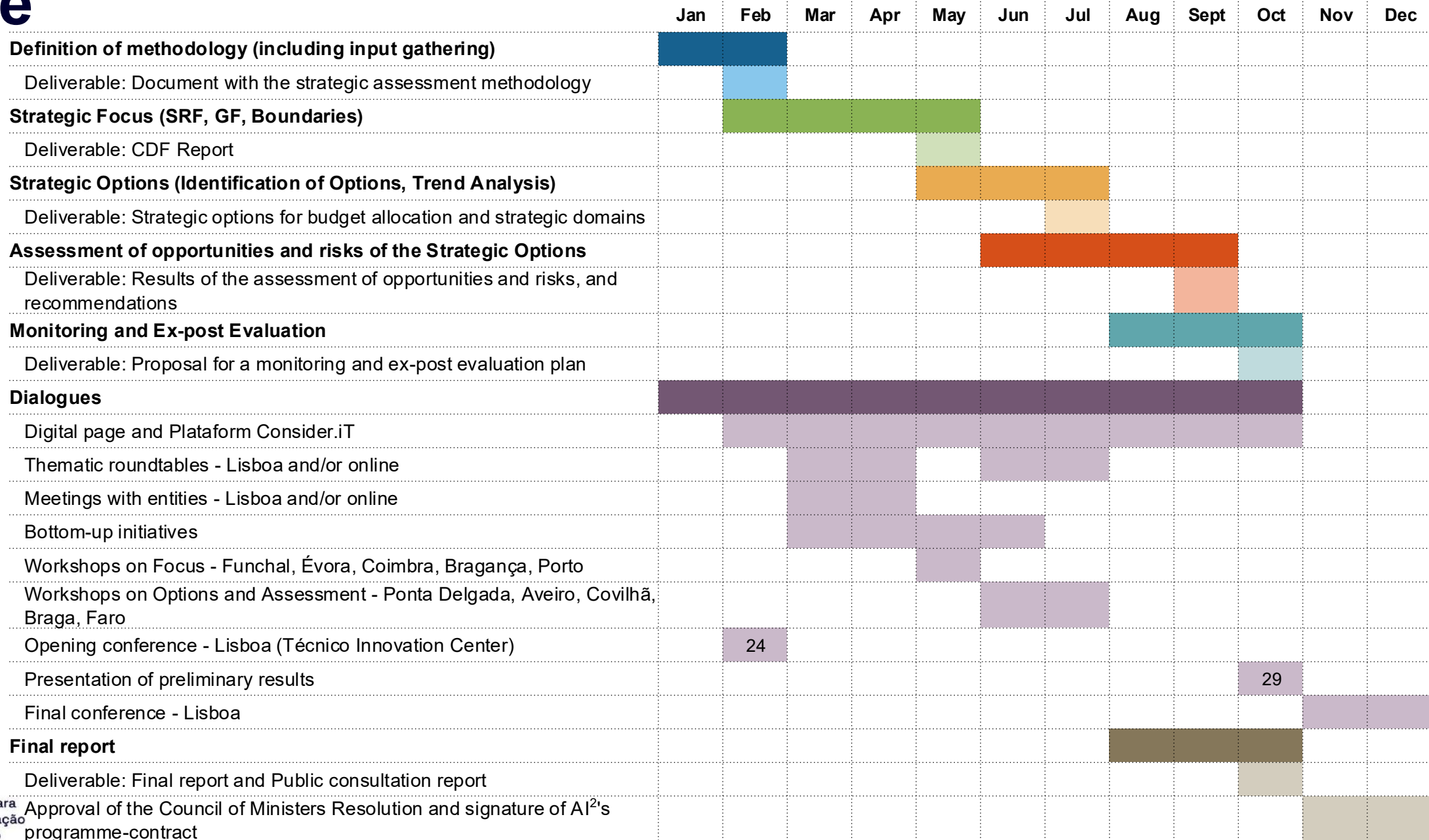
Phase 3: Assessment of Options



Phase 4: Monitoring and ex-post evaluation



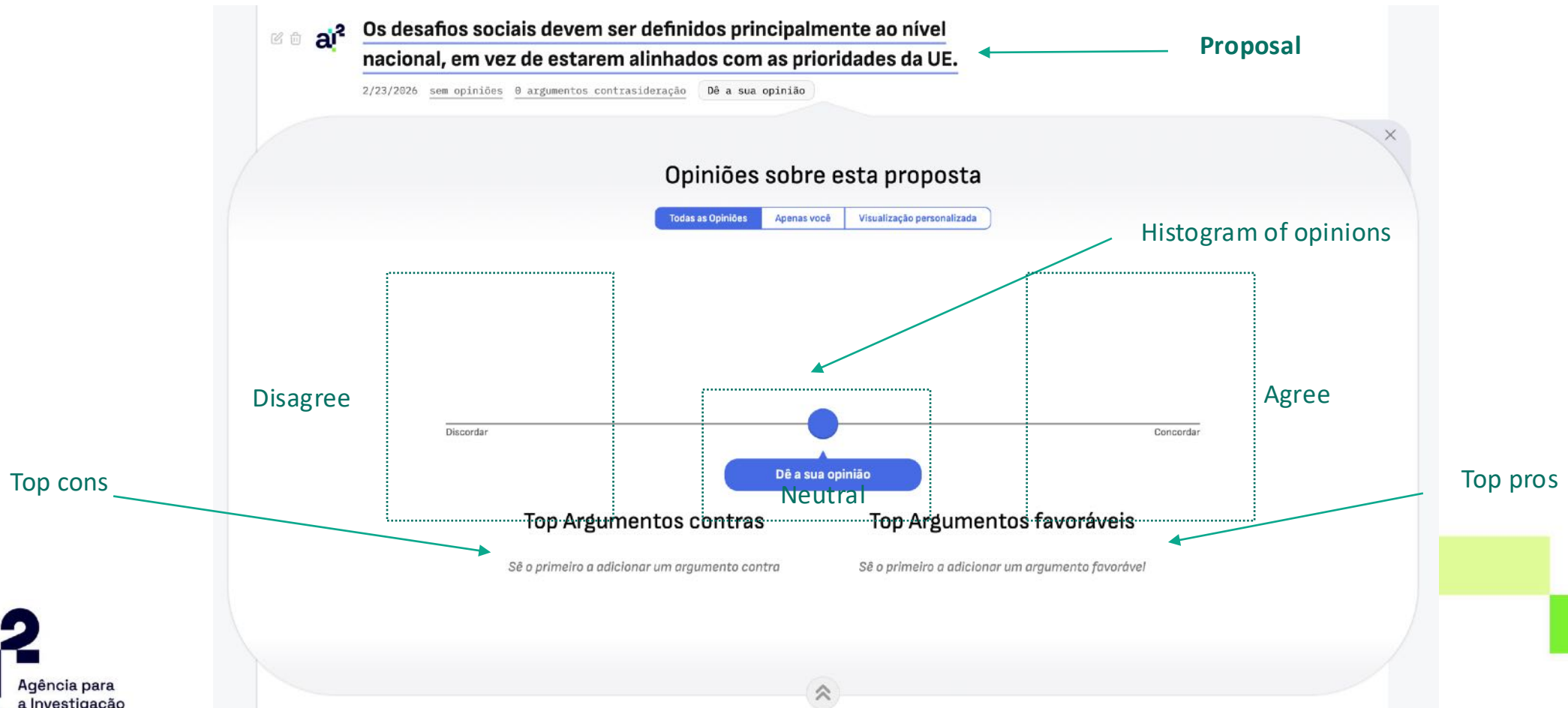
Timeline



<http://AI2Participa.pt>

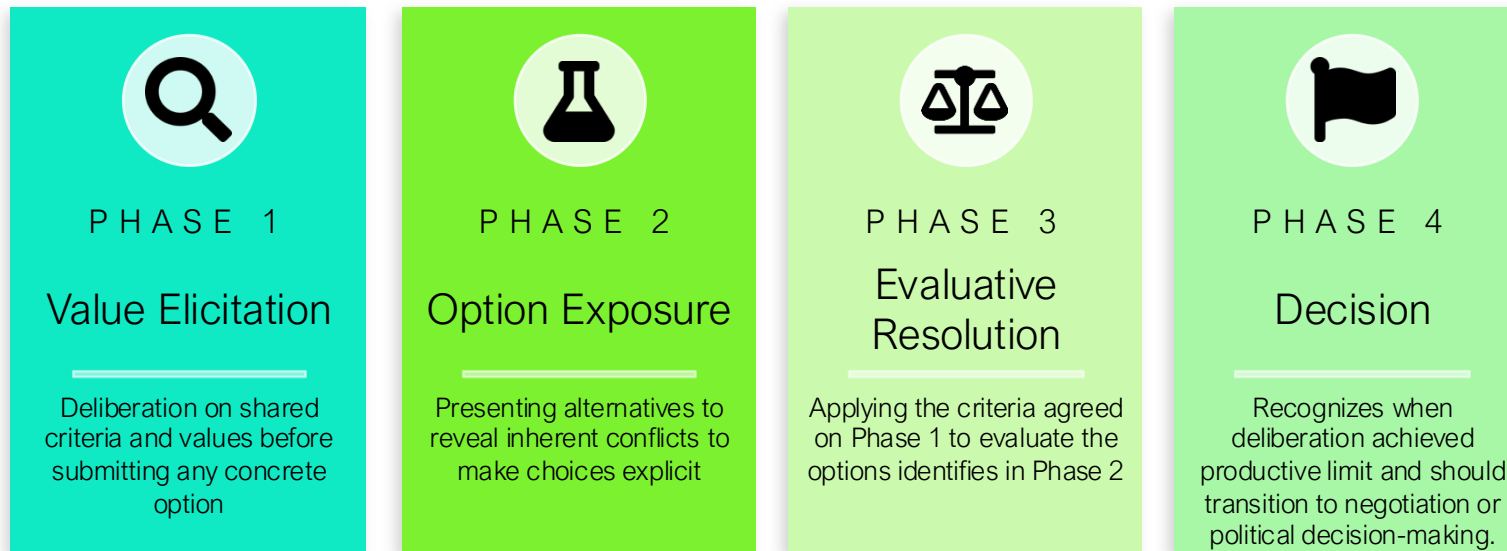
Nuno Jardim Nunes

AI2Participa.pt (Based on Consider.it – [Kriplean, 2012])



AI2Participa.pt

- Adapted to support the ST4S [Partidário, 2021]
 - Enables consensus on principles
 - Focuses on solutions for conflict in concrete choices
- Phased participation [Nunes & Partidario, 2026]:



Thank you