Taiwan Agricultural Technology Foresight 2025

Dr. Julie C. L. SUN
Taiwan Institute of Economic Research
August, 2011

The Agriculture in Taiwan

Taiwan, with nominal GDP $427 billion dollars and GDP (PPP) per capita $35 thousand dollars in 2010, is famous for its manufacturing capabilities. Agriculture seems to lose its importance in every aspect from job creation to domestic production, to international trade. But agriculture is still at the root of the economy and has multi-function beyond production. This is because it not only provides the food we eat, and conserves the environment we live in, it is also a force for social stability.

Confronting the challenges of WTO, globalization, climate change and knowledge-based economy, Taiwan government attempts to revitalize agriculture. The Council of Agriculture (COA) commissioned the project, Taiwan Agricultural Technology Foresight 2025, to Taiwan Institute of Economic Research (TIER). The project is four-year from 2008 to 2011, with average budget $350 thousand dollars annually, including foresight activities such as demand survey, trend and policy analysis, horizon scanning, scenario, bibliometrics, essays (competition), workshops, two-round Delphi, roadmapping, and policy suggestions (short-, mid-, and long-term development plan, and priority setting). This paper is aimed to introduce the framework of the project and to analyse the major part of the project based on the expert opinion by large scale Delphi survey.

Basic Premises

Long term perspective
Demand orientation
National well-being
Knowledge based
Integration of primary, manufacturing, and service Industries

The Purposes

Consensus building
Guiding strategic visions
Mid-long term planning
Communication and networking
Supporting Decision-making system

Transition from traditional agriculture to technology-based agribusiness
Taiwan Agricultural Technology Foresight 2025

- TIER set up a task force of 6 research staffs and 2 assistants from 2008. The task force learned the foresight techniques mainly from Japan, and built up the database including social needs, technological trends, research resources, critical issues and agricultural policies nationwide and worldwide. Under the support and approval of COA, the project set up the Planning Committee of 17 members, including government officers, agricultural experts, senior research fellows, social scientists and one economist.

- The Planning Committee decided that the target year of the project is 2025, and that the function of the foresight is to meet the long term objectives for agriculture in three aspects: Firstly, economically, to increase the productivity of the work force, to improve the efficiency in the use of farmland, to transform the industrial structure into knowledge-based economy, to reach sustainable growth and to keep international competitiveness; secondly, socially, to guarantee quality and safety of the product for consumer, to improve welfare for farmers and their families, to improve the quality of life in rural areas, to narrow the gap in living standards between urban and countryside; and thirdly, ecologically, to harmonize agriculture and the environment, to ensure sustainable use of agricultural resources, to maintain the nation's "green assets" and biodiversity.
Taiwan Agricultural Technology Foresight 2025

In order to link the foresight and policy, the project set up the **Strategy Formation Committee**, divided by 10 sub-committees, corresponding to the 10 research areas of COA, each of which is comprised of 4 agricultural experts and senior scientists on average. The members of the Strategy Formation Committee are nominated by the Planning Committee and approved by COA. The duty of the Strategy Formation Committee is to depict 2025 scenario and to figure out the research topics to meet the long term objectives for agriculture in Taiwan.

In 2009, the **Strategy Formation Committee** proposed more than 100 research topics for Taiwan Agricultural Technology Foresight 2025. TIER task force tried to adjust the research topics in a uniform format and to consolidate some of the research topics. Then the **Planning Committee** decided the final 74 research topics and the key questions (the impacts on industrial development, life quality, and environment protection, government support and importance) as the main part of Delphi questionnaire.

### The Content of Delphi Survey

- Global Trend / Bibliometric Analysis
- Socio-economic Needs Analysis
- Scenario Writing

Agriculture Related Strategy Formation (74 Research Topics for Questionnaire)

Taiwan Agricultural Technology Foresight 2025

During this period of time between 2008 and 2010, TIER task force analysed social needs, technological trends, research resources, critical issues and agricultural policies nationwide and worldwide for both Committees as background information. TIER task force carried out the foresight activities such as demand survey, horizon scanning, scenario, bibliometrics, essays (competition), workshops, conferences, and forums. TIER task force also set up a platform, the website dedicated for Taiwan Agricultural Technology Foresight 2025, including online Delphi Survey, and a database of more than three thousand experts and scientists in Taiwan.
系統提供每位專家一組帳號密碼(亦可自行修改)

Website: http://agritech-foresight.coa.gov.tw/
Two Rounds of Delphi Survey

- In 2010 TIER task force executed two rounds of Delphi survey of Taiwan Agricultural Technology Foresight 2025. The first round investigated 675 experts and scientists, 546 of which participated (response rate 80%), and 512 of which questionnaire were effective. The academia, research institutes, industry, and government account for 69%, 21%, 6%, and 4% respectively. The male and the female account for 78% and 22%. The groups of age, above 60, between 46 and 59, between 30 and 45, below 29 account for 35%, 25%, 30%, and 10% respectively.

- The second round investigated 546 experts and scientists, 413 of which participated (response rate 76%), and 407 of which questionnaire were effective. The academia, research institutes, industry, and government account for 66%, 25%, 5%, and 4% respectively. The male and the female account for 81% and 19%. The groups of age, above 60, between 50 and 59, between 40 and 49, between 30 and 39, below 29 account for 15%, 37%, 36%, 11%, and 1% respectively.

Survey Responses

- Based on the survey responses (Likert scale rating 1-5) to 74 research topics, the project compiled the indices of industrial development, life quality, environment protection, national priority and government support to measure the research topics in different aspects. Particularly, the papers define national priority as industrial development, life quality, and environment protection, with equal weights according to COA policy. The standard deviations of all indices at the second round become smaller than those at the first round, so it implies that the Delphi survey of Taiwan Agricultural Technology Foresight 2025 did converge.

- What follows is to study the relationships between industrial development, life quality, environment protection, national priority and government support to be need for the 74 research topics of Taiwan Agricultural Technology Foresight 2025. The survey shows that the government should support those research topics with higher ratings in environment protection and in life quality due to externality. It is, however, slightly correlated between industrial development and government support to be need for those research topics because some of them could be developed by the private sector.
Delphi Survey on Industrial Development

Top 10

1. Establishment of rapid diagnosis systems for infectious diseases of livestock, poultry and aquatic animals (2)
2. Establishment of mass quality fry production technologies for gourami, dace, and other important fishes (1)
3. Improvement of integrated safety test, certification, traceability system for agri-food products (3)
4. Improvement of high-quality seed and seedling production technology for the tropics and sub-tropics (4)
5. Development of agricultural and livestock production systems with IT and automation technologies (7)
6. Establishment of animal vaccine production systems that conform to international cGMP guidelines (6)
7. Development of efficient, labor-saving and safe facilities and technologies for agricultural production and processing operations (5)
8. Incentive development to foster a new generation of farmers and entrepreneurial management (10)
9. Construction of whole-plant orchid export system (8)
10. Development of crop production systems with low-energy consumption, low emission of greenhouse gases, and efficient use of water resources (12)

Note: ( ) The ranking of the first round.
Source: TIER(2010), The second round Delphi survey of Taiwan Agricultural Technology Foresight 2025

Delphi Survey on Life Quality

Top 10

1. Development of accurate, rapid and simple diagnostic kits for pesticide residues (1)
2. Improvement of integrated safety test, certification, traceability system for agri-food products (2)
3. Elucidation on the transmission mode and pathogenic mechanism of animal and human infectious diseases (3)
4. Improvement of forecasting and monitoring techniques for slopeland debris slides (5)
5. Research on ecological restoration of polluted farmland, drected rearing pond, overdrawn groundwater area, river bed and bank, and degraded forestland (4)
6. Promotion of recreational agriculture and rural development that integrate health, culture, leisure and nature conservation (7)
7. Elucidation of global climate change affecting Taiwan’s agricultural ecosystem and development of countermeasures (9)
8. Development of food-safety monitoring system and inspection techniques (6)
9. Establishment of database and diagnostic techniques for toxic substances in agricultural materials and products (10)
10. Construction of rural and urban linkages for quality living system (8)

Note: ( ) The ranking of the first round.
Source: TIER(2010), The second round Delphi survey of Taiwan Agricultural Technology Foresight 2025

Delphi Survey on Environment Protection

Top 10

1. Research on ecological restoration of polluted farmland, directed rearing pond, overdrawn groundwater area, river bed and bank, and degraded forestland (1)
2. Development of groundwater-saving aquaculture (3)
3. Improvement of forecasting and monitoring techniques for slopeland debris slides (2)
4. Development of crop production systems with low-energy consumption, low emission of greenhouse gases, and efficient use of water resources (4)
5. Elucidation of global climate change affecting Taiwan’s agricultural ecosystem and development of countermeasures (5)
6. Development of agricultural environmental-resources monitoring and disaster early-warning technology (6)
7. Integration of agricultural byproducts and refuses utilization systems and efficient energy conversion technologies (7)
8. Development of accurate, rapid and simple diagnostic kits for pesticide residues (8)
9. Research and development on ecoforestry and biodiversification (9)
10. Development of energy-saving and carbon-reducing preservation and shipping technologies of agricultural and processing products (12)

Note: ( ) The ranking of the first round.
Source: TIER(2010), The second round Delphi survey of Taiwan Agricultural Technology Foresight 2025

Delphi Survey on National Priority

Top 10

1. Development of accurate, rapid and simple diagnostic kits for pesticide residues (2)
2. Research on ecological restoration of polluted farmland, directed rearing pond, overdrawn groundwater area, river bed and bank, and degraded forestland (1)
3. Elucidation of global climate change affecting Taiwan’s agricultural ecosystem and development of countermeasures (4)
4. Improvement of integrated safety test, certification, traceability system for agri-food products (3)
5. Development of crop production systems with low-energy consumption, low emission of greenhouse gases, and efficient use of water resources (5)
6. Improvement of forecasting and monitoring techniques for slopeland debris slides (6)
7. Development of groundwater-saving aquaculture (7)
8. Development of agricultural environmental-resources monitoring and disaster early-warning technology (8)
9. Development of energy-saving and carbon-reducing preservation and shipping technologies of agricultural and processing products (9)
10. Elucidation on the transmission mode and pathogenic mechanism of animal and human infectious diseases (10)

Note: Derived from Industrial Development, Life Quality, Environment Protection; ( ) The ranking of the first round.
Source: TIER(2010), The second round Delphi survey of Taiwan Agricultural Technology Foresight 2025
**Delphi Survey on Government Support to be needed**

**Top 10**

| Improvement of forecasting and monitoring techniques for sloloped debris slides (1) |
| Research on ecological restoration of polluted farmland, derelict rearing pond, overdrawn groundwater area, river bed and bank, and degraded forestland (2) |
| Elucidation of global climate change affecting Taiwan's agricultural ecosystem and development of countermeasures (3) |
| Development of agricultural environmental-resources monitoring and disaster early-warning technology (4) |
| Development of groundwater-saving aquaculture (5) |
| Elucidation on the transmission mode and pathogenic mechanism of animal and human infectious diseases (6) |
| Collection and conservation of genetic resources in the face of climate change (7) |
| Improvement of integrated safety test, certification, traceability system for agri-food products (8) |
| Development of water system design and basin assessment techniques for irrigation and environment-regulation functions (10) |
| Establishment of transformation guidelines and impact assessment for sustainable farm land development (9) |

Note: ( ) The ranking of the first round.

Source: TIER(2010), The second round Delphi survey of Taiwan Agricultural Technology Foresight 2025

---

**Conclusions**

- It is the first time for Taiwan to carry out the expert opinion survey on large scale by Delphi approach. The project of Taiwan Agricultural Technology Foresight 2025 will have to offer policy suggestions by roadmapping in the end of 2011. So far, it has had some kind of achievements as follows: Informing funding and investment priorities, including direct prioritization exercises; Reorienting the science and innovation system to match national needs; Building networks and strengthening communities around shared problems; Building trust between participants unused to working together; Aiding collaboration across administrative and epistemic boundaries; Increasing understanding and changing mindsets, especially about future opportunities and challenges; Providing anticipatory intelligence to system actors as to the main directions, agents, and rapidity of change; Building visions of the future that can help actors recognize more or less desirable paths of development and the choices that help determine these; Increasing the number and involvement of system actors in decision-making, both to access a wider pool of knowledge and to achieve more democratic legitimacy in the policy process; Extending the range of types of actor participating in decision-making relating to science, technology and innovation issues; Improving policy implementation by enabling informed "buy-in" to decision-making processes.

---

**Evaluation / Impact**

- Setting research directions by identifying national needs
- Building networks around a common vision
- Extending the breadth of knowledge
- Bring new actors into the strategic debate
- Improving policy-making and strategy formation

---

**Taiwan Agricultural Technology Foresight 2025**


---

Taiwan Institute of Economic Research

Biotechnology Industry Study Centre

TEL: +886-2-2586-5000
FAX: +886-2-2597-9641