



European Economic  
and Social Committee

## Single Market, Production and Consumption Section (INT) 2025 Strategic Foresight Report (INT/1099)

### EXPERT HEARING

### SUMMARY REPORT

On 27 January 2026, the European Economic and Social Committee (EESC) held an expert hearing in hybrid format to discuss the integration of foresight into governance processes, geopolitical positioning, and economic resilience with leading experts in the field. This report provides a summary of the proceedings.

#### **OPENING AND OBJECTIVES**

The study group president Antonio García del Riego opened and outlined the purpose of the hearing: to gather input for the [INT/1099 opinion](#) and support forward-looking contributions towards the European Commission's [upcoming 2026 Strategic Foresight Report](#).

#### **PANEL 1: STRATEGIC FORESIGHT IN GEOPOLITICS**

##### **Key points by speaker**

##### **Rafał Kierzenkowski (OECD — Strategic Foresight Unit)**

**Foresight as tool to improve governance capability:** Position foresight as a practical, institutional routine that improves decisions under deep uncertainty and support long-term planning across policy domains; not prediction but disciplined preparation for non-linear, disruptive futures.

The OECD Strategic Foresight Unit anchors anticipation and long-term thinking by:

- (1) strengthening foresight within OECD for more robust policy analysis and advice,
- (2) supporting government foresight capacity,
- (3) bringing foresight to bear on OECD priorities and global policy debates.

The [OECD Strategic Foresight Toolkit for Resilient Public Policy](#) offers a five-step process:

1. **Explore disruptions:** challenge assumptions and identify possible disruptions,
2. **Imagine interactions:** explore co-occurrence and possible implications,
3. **Create scenarios:** develop alternative decision-relevant scenarios,
4. **Envision and strategise:** develop and stress-test strategies to expose fragilities, and
5. **Recommend policies:** identify robust options with monitoring indicators and propose scenario-agnostic actions with decision triggers.

**Illustrative geopolitical disruptions (2030–2050):** Examples include *Tech titans* (platform dominance confers geopolitical agency to private actors, challenging sovereignty, competition, accountability), and *Rising authoritarianism* (erosion of multilateral cooperation, state capture, and democratic destabilisation).

**Use of forecasting:** Crowd or AI-assisted forecasting can enhance signal tracking, provided that appropriate measures for accountability and bias mitigation are implemented. While AI supports detection processes, it does not replace human responsibility.

**Capacity building:** OECD Policy Foresight Academy (year-long applied programme) to embed anticipatory governance across strategy, finance, regulation, industrial policy and social dialogue.

### Chris Earney (UN Futures Lab)

**From reactive to anticipatory governance:** Highlighted the need to shift away from reactive crisis response and tie foresight to real decision moments, budgets and risk management to influence power and avoid optional processes, as foresight loses relevance when detached from the levers of institutional power.

**Systems lens:** Geopolitics has become a systems problem (supply chains, climate, technology, demographics, legitimacy, information integrity) with cascading cross-sectoral effects; foresight maps assumptions and second-/third-order effects to break silos and can facilitate shifts from reactive crisis management to proactive preparedness, surfacing trade-offs early.

**Design principles for uptake:** *hide the method, spotlight the insight* and lead with insights embedded in existing decision cycles without over-emphasising analytical complexity; reward short-term wins to lengthen horizons and tie foresight to immediate political risk (reducing surprise in the next budget cycle or crisis).

### Bronwyn Williams (UNDP — Strategic Foresight Advisor)

**From understanding to deciding and acting:** Understand how drivers interconnect and influence futures; clarify complex dynamics rather than complicating decisions under uncertainty. Foresight fails when it increases complexity rather than empowering confident decisions through clarity. Focus on leverage points where timely action yields outsized returns: investing in nature and ecosystems could unlock ~395 million jobs and ~USD 10 trillion in business value by 2030; every 1 USD in prevention can save \$26–\$103 in conflict-related costs; closing the digital access gap could unlock ~USD 1.5 trillion GDP by 2030; 3.4 billion people in developing nations face debt service outlays exceeding health/education; every \$1 invested in women's health can yield ~\$3 in growth.

**Global signal-scanning:** UNDP has ~700 active scanners in its network who participate in regular sense-making sessions to spot convergences before fracture points and convert insights into strategic plan priorities. 12 inter-connected drivers of multilateral change identified for its [Future of Development](#) work, means we can no longer address challenges in isolation.

**Purpose complementarity:** Separate forecasting (certainty-seeking) and foresight (certainty-challenging) to avoid false confidence and challenge assumptions to better navigate uncertainty. The EU can lead the future by keeping up development investment when others are retreating, invest in what works, and champion integrated approaches to solving systemic issues.

## Alice Ekman (EUISS — Research Director)

**Ground scenarios in present analysis:** Foresight is essential yet double-edged sword amid war and unpredictability: scenarios must be anchored in rigorous analysis of current facts, opaque actors and ideological drivers. Avoid attractive but groundless disruption narratives.

**Beware opacity and over-rationalisation:** Opacity of key actors; same facts often yield divergent conclusions. Avoid over-rationalisation that neglects ideology in great power struggles; declared ambitions often weigh as much as economics/purely material incentives. Prioritise plausible/most-likely trajectories (e.g. sustained China–Russia rapprochement) while acknowledging areas of genuine uncertainty and use history carefully to avoid false equivalences between very different regimes.

**Method cautions regarding generative AI:** Artificial intelligence should support but never replace critical human judgement. Be wary of AI-generated conclusions or using AI to draft scenarios. Use instead as prompts for expert critique and evaluate analytical errors; link historical perceptions to scenario framing.

## Panel 1 — Debate/Q&A

*Q: How to incentivise policy-makers to use foresight?*

A: Ground scenarios in data and emerging evidence so the starting point is uncontested; complement with probability-aware monitoring to help prioritisation under resource constraints; present decision-relevant insights; link to immediate risks; embed in existing processes; show short-term wins.

*Q: How to ensure coherence across multiple institutional foresight streams?*

A: Build coherence via distributed signal scanning and integrate sense-making across the organisation to align priorities; share drivers and leverage points to reduce duplication.

*Q: Role of psychology/ideology and internal EU threats?*

A: Map ideological drivers and declared ambitions; bringing behavioural perspectives helps, but first strengthen present-state analysis and avoid over-rationalising actors; chart internal vulnerabilities; maintain a hierarchy of likely threat actors.

*Q: Evaluating scenario results and learning from errors?*

A: Time horizons should fit the question (e.g., a five-year AI outlook); evaluate and assess preparedness outcomes rather than prediction; update scenarios as indicators move; institutionalise after-action reviews.

*Q: How to better anticipate financial crises and deal with black swans?*

A: Broaden 360° horizon scanning; revisit/challenge assumptions; examine structural shifts beyond simple uncertainty interpretations.

*Q: Strategic autonomy amid tech monopolies/data dependence?*

A: Reframe autonomy (self-sufficiency?) as resilience; a more viable conceptual framework than full independence. Use foresight to map where integration becomes irreversible dependence; design policy mixes (competition, procurement, standards, financing) to anchor capacity and let EU firms scale; define acceptable interdependence vs unacceptable concentration.

## **PANEL 2: THE EU'S FUTURE ROLE IN A CHANGING GEOPOLITICAL LANDSCAPE**

### **Key points by speaker**

#### **Nis Grünberg (MERICS — Lead Asia Analyst)**

**China's system stability:** Power consolidation under Xi and the strategic project to reposition China amid changes unseen in a century, seen as a window to elevate China's position. Europe is functionally relevant but strategically subordinate in Xi's worldview; engagement remains pragmatic, tactical and interest-driven. The current regime is aligned on protecting global commons, stability and maintaining a predictable (rules-based) order.

**Industrial strategy and policy implications:** The 15<sup>th</sup> Five-Year Plan for 2026–2030 seeks technological self-reliance and leadership in green/high-tech manufacturing. PRC is willing to pay short-term economic costs for political priorities; EU dependencies and alignment of all capital with political objectives give Beijing leverage—Europe must identify levers and build credible counter-levers and reduce exposure to single-point vulnerabilities. Need for risk-management strategies that anticipate China's evolving geopolitical posture.

#### **Penny Naas (GMFUS — Senior Vice President)**

**Transatlantic ties are defined by investment:** two-way foreign direct investments (FDI) and affiliate income dwarf trade relationship; this creates shared incentives and exposure that favour coordination over decoupling. Mutual dependencies and shared infrastructure require joint planning on critical infrastructure to build resilience, clean tech, and regulatory standards.

**Strategic autonomy means capacity to act:** while deeply connected, Europe should strengthen the Single Market; deepen capital markets, strengthen its industrial base and scale European champions (Airbus-style). Counter narratives that Europe is *uninvestable* by leveraging predictability and rules. Strategic autonomy should mean capacity to act, not distancing from the US.

#### **Jean-Louis De Brouwer (Egmont Institute — Director)**

**Foresight should inform choices without over-prescribing;** avoid overly prescriptive recommendations and focus on no-regrets choices that perform well across futures. Europe's integration model must adapt to a world of power politics while preserving its cohesion strengths. The EU should leverage its credibility as a rules-based actor; pair soft-power ambitions with realistic assessments of hard-power and financial-system gaps to build capabilities and financial mechanisms that support strategic action.

### **Panel 2 — Debate/Q&A**

*Q: Advantage in not being seen as a hegemon?*

A: EU can bridge interests, set standards and act as a predictable hub if it reduces critical dependencies and acts coherently. It can ease pragmatic, interest-driven engagement; however, dependency erodes leverage—EU must develop credible counter-levers.

*Q: Defence dependence and leverage?*

A: Alliances remain essential as they pool complementary strengths. Europe should scale defence industry and durable leverage comes from deepening EU capital markets while coordinating on infrastructure

resilience. The EU must rethink its model—including geographic relations—with neighbours such as the UK; align domestic political trajectories with external strategy. There is an imbalance between legacy social spending and future-oriented investment; reforms are politically difficult, but engaging youth perspectives and improving Europe's investment climate are essential.

### **PANEL 3: ECONOMIC AND GLOBAL GOVERNANCE PERSPECTIVES**

#### **Key points by speaker**

##### **Nigel Pain (OECD — Macroeconomic Policy Division)**

**Growth, resilience, and fiscal headwinds:** per-capita living-standards growth has slowed since the global financial crisis, reducing shock-absorption capacity. However, the EU remains a major trading/FDI actor, and the euro has an international role. Priorities: advance a robust Capital Markets Union, Single Market deepening (esp. services); reduce regulatory burdens via rigorous ex-ante and ex-post assessments; boost labour market participation by investing in science, skills and labour mobility; facilitate older-worker and female participation; explore pan-EU defence procurement and standards. Fiscal pressures (debt, defence, pensions, health, climate) require reprioritisation and higher participation rates.

##### **Camille Reverdy (Bruegel — Associate Fellow)**

**Managing interdependence without retreat:** Interdependence is increasingly weaponised (supply chain disruptions, sanctions and counter-sanctions, export controls on technology, tariff instruments and investments as geopolitical tools) in a structurally unstable world. The EU must distinguish critical dependencies from normal market exposure; stay connected and manage risk without closing the economy and retain influence to shape standards. Act as a stabilising economic hub by leveraging Single Market as anchor; use market access conditions and financial governance to build fair and sustainable systems via alliances and economic diplomacy; credibility depends on policy coherence.

##### **Enrico Giovannini (ASviS — Scientific Director)**

**Purpose, new metrics, and no-regrets options in turbulent times:** Institutionalise foresight throughout the policy cycle; privilege no-regrets options. Re-centre policies around Article 3 Treaty of EU—peace, values and well-being—and adopt beyond-GDP metrics aligned with the SDGs. EU outperforms on well-being and sustainability; lead the post-2030 Agenda revision; uphold sustainability and due-diligence regimes; modernise statistics (e.g., productivity in the AI era) to avoid distorted policy signals. Revisit EU budget capacity and institutional reforms to expand EU budget scope and focus on important things, not only emergencies.

#### **Panel 3 — Debate/Q&A**

*Q: Sustaining the social model with low growth; a 28th regime for more pan-European companies?*

A: Pension sustainability requires structural reforms and higher employment; a 28th regime can help reduce market fragmentation but must be paired with wider regulatory/skills reforms and capital market depth.

*Q: Can soft power move agendas without hard power (e.g., in AI where the EU is more referee than player)?*

A: EU can shape use-cases, safety and reliability via standards, most effective when paired with industrial depth and credible security posture. Important that policymakers differentiate between the very costly development of AI technologies from the application of them.

*Q: Long-term risk horizon*

*A: Near-term geopolitical risks dominate, but 10-year horizons point to climate-related ecological risks; apply no-regrets choices serving multiple scenarios.*

## **CROSS-CUTTING CONCLUSIONS**

Key outcomes included insights on institutionalising foresight deliverables, strengthening Single Market resilience, and managing interdependence strategically:

- Embed foresight in decision cycles (budgets, risk registers, programme design) and require ex-post learning reviews.
- Institutionalise foresight deliverables in decision packets (assumptions, alternatives, indicators, triggers, cross-scenario stress-tests).
- Prioritise leverage points with high return/risk-reduction (prevention, digital inclusion, critical supply-chain nodes) and assign owners and timelines.
- Strengthen Single Market resilience (services integration, Capital Markets Union, proportionate regulation with ex-post reviews, pan-EU defence procurement standards).
- Map critical vs normal dependencies; manage—do not sever—interdependence using market access, standards, and public procurement to de-risk strategically.
- Frame recommendations around Article 3 TEU and the SDGs; adopt beyond-GDP indicators for appraisal and monitoring.
- Design transatlantic cooperation by default for infrastructures, clean tech, standards and supply security, leveraging EU regulatory predictability and investment depth.
- Adopt a realism-first stance on China (continued push for tech self-reliance and political primacy); reduce single-point dependencies and build credible counter-levers.
- Modernise statistics and productivity metrics for the AI economy to reflect prevention dividends and sustainability externalities.
- Reduce critical dependencies while staying connected; use standards, procurement and investment vehicles to scale EU capacity in strategic tech/infrastructure.
- Strengthen credibility: simplify rulebooks while ensuring policy consistency; uphold sustainability and due-diligence regimes.
- Invest in capabilities and skills, inter-generational fairness and defence-industrial scaling at EU level.

The slides presented and the full agenda of the hearing are available on the EESC website at:

<https://www.eesc.europa.eu/en/agenda/our-events/events/2025-strategic-foresight-report>

---

© European Union, 2026.

*Except otherwise noted, the reuse of this document is authorised under the Creative Commons Attribution 4.0 International (CCBY 4.0) licence (<https://creativecommons.org/licenses/by/4.0>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.*

**Disclaimer:** This report includes content drafted with the assistance of Microsoft 365 Copilot and the [European Commission's eReporting](#) web service. All material generated by these AI-based tools has been reviewed, validated, and, where necessary, amended prior to publication.