



Answering
tomorrow's
challenges
today

Resilience by design, not by reaction

EU strategic policy priorities towards
a future-proof Europe

November 2025



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EU strategic policy priorities towards a future-proof Europe

Europe's economic and industrial landscape is at a critical juncture. Strategic dependencies, supply chain disruptions, and tariff volatility have exposed structural vulnerabilities that can no longer be managed through crisis-driven responses. In a world defined by geopolitical uncertainty and fierce competition, resilience is no longer optional; it has become a prerequisite for long-term competitiveness and stability.

The question is no longer whether Europe should act, but rather how it designs resilience in its economic strategy while remaining open, innovative and a trusted global partner.

A new era is emerging and, with it, a new policy direction. The EU is shifting from a purely market-driven stance towards an economic security framework that aligns with competitive strength, industrial strength and strategic autonomy. Recent strategies and legislative initiatives increasingly underscore a clear shift through industrial strategy, procurement reform, and clean tech investment, as well as new tools for a robust response to build Europe's resilience. Below, we highlight 5 top priorities shaping Europe's resilience agenda.

1 | Building strategic industrial capabilities

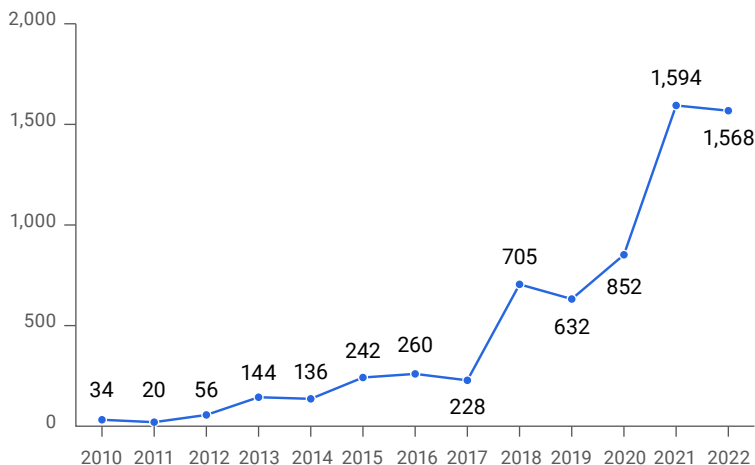
While it aims to preserve the advantages of open markets and interdependence, Europe is moving from a purely market-driven approach to one that integrates economic security into its competitiveness strategy.¹

- “We are witnessing a shift from free market orthodoxy to national security oriented one.”

Draghi, M. (2024). The Future of European Competitiveness: A Competitiveness Strategy for Europe (Part A & Part B). European Commission. 09 September 2024.

- ¹ Juhász, Lane and Rodrik (2024) “The New Economics of Industrial Policy”, Annual Review of Economics, Vol. 16:213-242, <https://doi.org/10.1146/annurev-economics-081023-024638>

Total number of industrial policy interventions



Source: Juhász, Lane and Rodrik (2024) "The New Economics of Industrial Policy", Annual Review of Economics, Vol. 16:213-242, <https://doi.org/10.1146/annurev-economics-081023-024638>

The new European Industrial Strategy seeks to address strategic dependencies, reinforce the Single Market, and support the green and digital transitions. Its central objective is to reduce the EU's exposure to external vulnerabilities related to critical materials, technologies, and food supply. At the same time, it focuses on developing competitive markets, products, and services within the EU to strengthen long-term economic resilience.

Key priorities:

Identify and reduce critical supply chain risks by mapping dependencies in critical materials, technologies and food supply, and use public procurement reform to prioritise resilience and sustainability over lowest price only, including joint procurement for strategic stockpiles in key sectors.¹

Reconcile climate ambitions with industrial competitiveness goals, and use the Clean Industrial Deal (2025)² and the Industrial Decarbonisation Accelerator Act³ to expand EU-based manufacturing of batteries, hydrogen, semiconductors and other clean technologies, backed by faster permitting, targeted state-aid and investment de-risking.

Strengthening key sectors: energy as the backbone of resilience

In 2023, 58% of the EU's primary energy needs were met through imports, exposing the system to price volatility and geopolitical risks. The European Green Deal, Fit for 55, REPowerEU, and the Clean Industrial Deal set the course: accelerate the deployment of renewable energy, diversify supply, and support industrial competitiveness are the strategic priorities. What matters now:

¹ Juhász, Lane and Rodrik (2024) "The New Economics of Industrial Policy", Annual Review of Economics, Vol. 16:213-242, <https://doi.org/10.1146/annurev-economics-081023-024638>

² European Commission, 'Clean Industrial Deal' (2025) https://commission.europa.eu/topics/competitiveness/clean-industrial-deal_en

³ European Parliament, 'Industrial Decarbonisation Accelerator Act', Legislative Train (2025) <https://www.europarl.europa.eu/legislative-train/theme-a-new-plan-for-europe-s-sustainable-prosperity-and-competitiveness/file-industrial-decarbonisation-accelerator-act>

- **Diversify energy sources and secure supply chains**
- **Modernise grids and infrastructure for flexibility**
- **Fast-track renewables and clean technologies into the market**

Decarbonisation must become business as usual, backed by risk and carbon footprint assessments for funded projects and by creating lead markets for low-carbon materials and products.

2 | Reduce dependencies through strategic partnerships

Supply chain resilience and economic security are vital for long-term growth. To safeguard its industrial capacity and autonomy, Europe must reduce overreliance on external suppliers for critical inputs such as raw materials, technologies, and energy, while staying open to cooperation. The EU Economic Security Strategy (2023)⁴ and the Competitiveness Compass (2025) guide this effort by promoting comprehensive risk mapping, diversification of sourcing, and critical sector-specific standards.

Key priorities:

Strengthen supply chains for semiconductors and critical raw materials via the Chips Act (Sept 2023) and Critical Raw Materials Act (April 2024). Expand partnerships in energy, digital tech, and raw materials to ensure reliable, sustainable access and mutual trust.

Use blended finance tools like Global Gateway and InvestEU to de-risk investments in partner countries and attract private capital for resilient supply chains.

Develop advanced early warning systems to track price shifts, logistical issues, and geopolitical risks, enabling swift, informed responses⁵.

3 | Deepening the Single Market for resilience by design

The Single Market is the backbone of European resilience, but only if fragmentation is eliminated where it matters most. Facilitating cross-border operations creates scale and flexibility, allowing resources, goods, and services to move quickly in the event of disruptions. Integration also strengthens energy and digital connectivity, making supply chains less vulnerable to

⁴ European Commission, 'Strategic Autonomy and European Economic and Research Security' (2024)
https://research-and-innovation.ec.europa.eu/strategy/strategy-research-and-innovation/europe-world/international-cooperation/strategic-autonomy-and-european-economic-and-research-security_en

⁵ European Commission, 'Competitiveness Compass' (2024)
https://commission.europa.eu/topics/competitiveness/competitiveness-compass_en

localised shocks and external dependencies.

Key priorities:

Harmonise and enforce regulations and improve enforcement across Member States to ensure seamless cross-border operations, leveraging the Single Market Programme (2021-2027).

Invest in large-scale energy and transport infrastructure, including grid expansions and corridors, to remove bottlenecks, building on existing cross-border infrastructure projects with the introduction of the Trans-European Networks for Energy (TEN-E) framework⁶.

Accelerate the digital and green transitions by prioritising large-scale investments in renewable energy capacity, smart grids, and energy storage, supported by the Recovery Fund and NextGenerationEU.

4 | Financing resilience and inclusion

Resilience policies need EU cohesion and inclusion to ensure long-term stability. This includes investment strategies that can bridge supply-demand gaps, avoid “one-size fits all” approaches and reach underserved regions and actors, ensuring that the transition benefits all.

The EU cohesion policy (2021–2027), alongside the Recovery and Resilience Facility, is being modernised to channel investments into green and digital infrastructure, defence, water resilience, and military mobility. Proposals from the European Economic and Social Committee (EESC) further advocate for a permanent fiscal stabiliser and resilience monitoring combined with a €700 billion annual investment plan (~1% GDP) focused on equitable energy and digital transitions across regions⁷.

Key priorities:

Focus on long-term, predictable financing frameworks using cohesion funds and InvestEU, moving beyond short-term crisis funding.

Implement mechanisms for equitable risk sharing and benefits distribution to foster solidarity and balanced resilience across regions, which is essential for cohesion and long-term stability.

Encourage cross-border cooperation and knowledge exchange for sharing best practices on energy transition and resilience planning.

- “Deepening the single market provides a clear double dividend: it drives growth and creates a platform for resilience. Further EU integration could unlock up to €1 trillion in total economic gains. Europe’s strength lies in unity.”

Román Arjona, Chief Economist
at the EC DG GROW.

- ⁶ European Parliamentary Research Service. (2025). Modernising EU cohesion policy: Key issues and challenges (EPRS_BRI(2025)774695). European Parliament.
[https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/774695/EPRS_BRI\(2025\)774695_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/774695/EPRS_BRI(2025)774695_EN.pdf)

- ⁷ European Economic and Social Committee. (n.d.). EESC calls for a bold new strategy to tackle the cost-of-living crisis and build lasting resilience.
<https://www.eesc.europa.eu/en/news-media/news/eesc-calls-bold-new-strategy-tackle-cost-living-crisis-and-build-lasting-resilience>

5 | Institutional governance for resilience

Strengthening institutional governance is critical for building EU resilience.

Effective leadership, coordinated investment delivery, and the ability to adapt to diverse member state capacities require breaking down silos and adopting a transversal, forward-looking policy approach.

Key priorities:

Prioritise data innovation and strategic foresight through collaboration with EU bodies and international partners (e.g., OECD, JRC) to map supply chain risks and economic shocks.

Integrate strategic foresight into all EU institutions to foster a shared vision and coordinated policy responses to future challenges.

Establish joint governance bodies and streamlined procurement frameworks across the EU and Member States to deliver investments efficiently, inspired by the multi-level governance approaches in EU Missions⁸.

⁸ European Environment Agency. (n.d.). Step 1.3 – Preparing the ground for adaptation. Climate-ADAPT. <https://climate-adapt.eea.europa.eu/en/mission/knowledge-and-data/regional-adaptation-support-tool/step-1-preparing-the-ground-for-adaptation/step-1-3>



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