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The foresight approach

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To shed some light on possible directions for research and public policies, but also to help equine industry stakeholders to prepare for upcoming changes, the French National Institute for Agricultural Research (INRA), together with the French Institute for Horse and Horse Riding (IFCE), have conducted a collective scenario-building exercise for the French equine industry to 2030. The study is based on "morphological analysis", a method which explores past and current trends, and potential shifts in order to consider possible future developments.

Keywords: scenario, morphological analysis, future

Exploring possible futures to inform decision making

Foresight as an exercise neither claims to provide quantified or dated representations of a future situation, nor intends to scientifically dictate future options to decision makers. It is an exploratory approach designed to bring clarity to current action in light of possible futures (Godet, 1991). The purpose of analysing possible trend scenarios is to provide decision makers and researchers with useful knowledge to inform their future actions, based on their intentions and expectations. It seeks to raise awareness of possible upcoming trends among economic and institutional stakeholders, and therefore to help them to prepare for change. In this sense, foresight can be a relevant decision-making tool for defining research orientations and industry strategies.

By identifying the main trends, areas of uncertainty and risks or opportunities for change, foresight provides a wide range of representations of the future. It can create room to manoeuvre and point to choices to encourage or avoid. In departing from the current baseline, scenarios describe stories, eliciting new and original visions and suggesting paths of strategic analysis.

As a result, decisions may be reactive, responding to an anticipated situation – 'if this scenario were to occur, how could we best be prepared?' – or proactive, to increase the likelihood of a desirable scenario or the unlikelihood of an undesirable one occurring.

The French horse industry: Scenarios 2030

A wide variety of activities are grouped within the horse industry, gathered into sub-industries or 'segments', with numerous stakeholders who do not necessarily share common interests or have any contact with one another. However, boundaries between segments tend to be porous, due to the trade in animals (Rossier, 2004). Each horse has an individual 'career' and may move between segments over the course of its life. For example, a horse may start off in racing, then be moved to an equestrian centre before finally being sold to the abattoir. Given the circulation of animals between segments, the authors of the report decided not to exclude any of the industry's activities from the foresight's frame of reference. The study therefore includes the various activities and uses of horses, with particular emphasis on racing, sport, recreation, tourism, work and meat segments where horses and ponies are used the most.

The 'industry' is defined as all stakeholders directly involved in equestrian and horseracing activities. They range from professional and non-professional breeders (farmers, companies, etc.) to final users, whether riders, bettors, horsemeat consumers or simple citizens, including independent horse owners, for whom breeding may be a secondary economic activity, and any other actors involved in horseracing or equestrian activities. The industry includes all movement between segments that is generated by these activities.

The geographic scope of the study scenarios was the territory of France, as industry collaboration and action is best envisaged and planned at this level. However, in order to accommodate the diversity that exists across France, the exercise drew on regional case studies. The study then also considered developments at European and international level, likely to impact on the industry's evolution.

The 2030 timeline had experts considering the future 20 years from now. This may seem too short a period to envisage any substantive change, given how slow change has been in the past. However, it adequately reflects the acceleration of changes affecting the industry, especially because of current policy and regulatory changes, and advances in technology. Within 20 years, current uncertainty surrounding future drivers may be clarified so that future action may be planned. Twenty years is sufficient to explore current trends and seeds

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of change that may have substantial impact, yet is immediate enough to remain of interest to decision makers.

Methods

A collective and interdisciplinary effort

The study was carried out by a joint INRA–IFCE project team that facilitated and informed the multi-disciplinary panel's efforts to build future scenarios. In order to benefit from a broad range of knowledge and opinions, the steering committee invited a cross-section of people to take part in the panel from various disciplines, including researchers, representatives and economic stakeholders from the different segments of the industry. They met 11 times over an 18-month period to build possible visions of the future, using the scenario method. The collective and participatory approach gave participants the opportunity to share a common experience and common points of reference. The resulting study was thus interdisciplinary by nature.

In view of the complexity of bringing together the industry's diverse activities and segments, the panel's work was complemented by a large number of targeted interviews with industry stakeholders. A total of 62 people were interviewed: 25 economic stakeholders, 21 representatives of socio-professional agencies, 8 teaching or research professionals, and 8 ministry and IFCE experts. The interviews allowed the panel to round out the bibliographic sources used to inform their analyses.

The scenario method for exploring possible futures

The foresight approach is based on a 'morphological analysis' method (de Jouvenel, 1999), whereby possible futures are explored using a combination of assumptions on trends in areas that will have an impact on the future of the system in question. While the scenario method cannot predict the future, it does offer simple means of articulating knowledge and organising analysis of what is a complex undertaking due to the multiple factors at play and the uncertainty of their future development.

The first stage of the scenario-building exercise consisted in identifying all the 'driving forces' influencing or likely to influence the French horse industry on the 2030 timeline, and organising them into main themes. Past and current trends were then analysed in order to define primary or emerging trends and possible shifts. The panel then developed assumptions regarding plausible trends by 2030 for each of the driving forces. Grouped together by theme, these assumptions created 'microscenarios' which, in turn, were grouped together to form the final 'scenarios' (Commissariat Général du Plan, 2004).

From the many possible combinations, the choice of disparate exploratory scenarios was based on the following criteria:

- they are relevant for action, in that they clearly emphasise the challenges, uncertainties, risks and opportunities that must be taken into account by the study;
- they are coherent, that is, they offer logical combinations of assumptions to give a coherent representation of the system as a whole;
- they are plausible;
- they are transparent, that is, legible and justified;
- they are sufficiently varied to offer a broad vision of possible futures.

Regional workshops to illustrate diversity

From the outset of the project, the members of the panel drew the project team's attention to the regional diversity of the horse industry and to the need to complement the global approach with a more regional one. More nuanced scenarios would thus better reflect local realities. The scenario analysis was therefore complemented with examples of impacts to three regions with very different profiles:

- Lower Normandy, home of France's largest horse population and a centre for breeding, racehorse training and riding;
- Île-de-France, main equestrian region in terms of the number of licensed riders, and main horseracing region in terms of the number of races organised every year;
- Languedoc-Roussillon, a tourist region with strong cultural ties to horses and a strong link between horses and the land.

Thanks to the support of regional IFCE branches and of the regional horse and equine councils, the project set up workshops in each region. In half-day workshops, professional representatives and economic and regional stakeholders were asked to imagine the scenarios' impacts to their region. Based on a review of the regional industry and a presentation of the foresight exercise and scenarios, the participants analysed and discussed the scenarios' consequences in economic, social, environmental and health terms. The project team was able to use the workshops and additional academic findings to develop specific regional case studies for the scenarios, which reflect the diversity of the horse industry in France. The scenario findings were reinforced by cross-checking their coherence, plausibility and relevance.

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