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# ERA-LEARN Annual Report 2024

Strengthening the Partnership Community



# ERA-LEARN Annual Report 2024

# Foreword

In 2024, European Partnerships reached an important milestone as we celebrated their 20th anniversary. Since their humble beginnings under FP6, they have grown to be a cornerstone of both the Framework Programme (FP) and the European Research Area. Bringing together resources from the public and private sectors to address common challenges has shown how much we can achieve through effective collaboration.

2024 saw important developments in the European Partnerships portfolio. Following the adoption of the 2nd Horizon Europe Strategic Plan, nine new partnerships were launched (five co-funded and four co-programmed) bringing the total to 60 European Partnerships under Horizon Europe.

Another highlight of 2024 was the publication of the 2nd Biennial Monitoring Report (BMR) on the performance of European Partnerships. Like its predecessor, this edition provides evidence on the contributions of partnerships to Europe's twin green and digital transition, as well as their role in enhancing Europe's resilience and its competitiveness. The 2024 edition also explored two new topics high on the EU policy agenda: Europe's technological sovereignty and the international positioning of European research and innovation.

Looking ahead, reflections on the future of European Partnerships and the next Framework Programme (FP10) gathered momentum. In this context, the Partnership Knowledge Hub (PKH) published an Opinion outlining recommendations on the European Partnerships landscape under the next FP.

ERA-LEARN has continued to be a valued partner to the European Commission in this work. Through good collaboration, ERA-LEARN has provided strong support to the European Commission and the European Partnerships in their implementation and has contributed to the effective dissemination of knowledge and best practices across the community.

This annual report, the 10th edition prepared by the ERA-LEARN team, offers a concise overview of national participation, thematic focus, and funding contributions to joint calls under Horizon 2020, while also capturing the transition to Horizon Europe. It highlights key activities in 2024, including the co-organisation of the European Partnership Stakeholder Forum celebrating 20 years of European Partnerships, the publication of new strategic resources, and the continued provision of data, guidance, and tools supporting the evolving Partnership landscape.

**Fabienne Gautier**

DG RTD,  
Head of Unit G4 Common Missions and Partnerships Service

# Executive Summary

In 2024, ERA-LEARN continued to play a pivotal role in supporting the evolving partnership landscape. Key strategic outputs included the co-organisation of the European Partnership Stakeholder Forum 2024 in Brussels, celebrating 20 years of European Partnerships and engaging more than 400 participants in shaping the future direction of the 10th Framework Programme (FP10). Several new strategic resources were published, including a brochure marking two decades of partnerships, guidance documents on synergy creation and international cooperation, and the ninth ERA-LEARN Country Report, focusing on Austria (which was an update of the 2019 report). ERA-LEARN also contributed to the launch of the second Biennial Monitoring Report (BMR) and supported workshops and webinars addressing priority topics such as administrative burden, monitoring, and the implementation of additional activities in co-funded partnerships.

Statistical data presented in this report continues to reflect the dynamic evolution of the P2P landscape. During 2024, 30 joint calls closed: 18 from Horizon 2020 funded partnerships and 12 from Horizon Europe co-funded partnerships. The number of active Horizon 2020 partnerships declined as 10 concluded during the year, leaving 18 still operational at the end of 2024. In total, more than 900 joint calls have been launched since 2004, resulting in more than 11,000 funded transnational projects.

Horizon 2020 partnerships, including JPIs and self-sustained networks, have implemented 482 joint calls, with ERA-NET Cofunds contributing the largest share. National financial commitment to Horizon 2020 P2P calls in 2024 exceeded Euro 205 million, with 68% allocated to additional ERA-NET Cofund joint calls (without EU co-funding). Cumulatively, more than Euro 10.2 billion has been committed to P2P joint calls since 2004 (excluding EU contributions), with over Euro 3.1 billion attributed to ERA-NET Cofund calls alone.

While detailed data on Horizon Europe projects is still being collected, we know that 26 co-funded partnership calls had closed by the end of 2024, and national investment in Horizon Europe joint calls (all types) has already reached nearly Euro 9 billion. This reflects the higher budgets and strategic ambition of Horizon Europe compared to its predecessors.

As the partnership ecosystem evolves, ERA-LEARN remains a central platform for data, tools, and guidance. The website continues to offer essential resources, including the R<sup>2</sup>IPE Toolkit, strategic studies, and an expanding partnership database. ERA-LEARN will continue to support the community with up-to-date information, training opportunities, and practical insights to facilitate the success of European Partnerships under Horizon Europe and beyond.

We could not provide the statistical data without the support of the P2P partnerships that take the time to provide this data on a regular basis and so we thank all of them for their continued support.



# Contents

<b>Foreword</b>	<b>2</b>
<b>Executive Summary</b>	<b>3</b>
<b>Contents</b>	<b>5</b>
<b>1. Introduction</b>	<b>6</b>
<i>Limitations</i>	7
<i>Acknowledgements</i>	7
<i>Feedback</i>	7
<b>2. ERA-LEARN in 2024</b>	<b>8</b>
<i>European Partnership Stakeholder Forum 2024</i>	8
<i>Two Decades of European Partnerships Brochure</i>	9
<i>Toolbox and guidance on mechanisms for synergy creation for European Partnerships</i>	11
<i>Guidance on international cooperation for European Partnerships</i>	12
<i>Workshops and Webinars</i>	12
<i>Country Reports</i>	14
<i>ERA-LEARN Website</i>	15
<b>3. Overview of the Partnership Landscape</b>	<b>16</b>
3.1. <i>2024 Joint Calls</i>	16
3.2. <i>Joint Calls – Numbers and Funding Commitment</i>	17
3.3. <i>Portfolio of Funded Projects</i>	22
3.4. <i>Thematic Analysis</i>	24
3.5. <i>Comparative Indicators between Countries</i>	25
<b>4. Conclusion</b>	<b>29</b>
<b>Appendix</b>	<b>30</b>

# 1. Introduction

The ERA-LEARN annual report continues to be focussed on the Public-to-Public partnership landscape from the dawn of the ERA-NET scheme in 2003, albeit now with more emphasis on the Horizon 2020 partnerships as they transition towards Horizon Europe. While the partnership landscape has changed in recent years, and ERA-LEARN has evolved in line with this, the Annual Report, currently, does not include any detailed analysis or statistics on the European Partnerships under Horizon Europe in order to avoid duplication with the wealth of data provided in the Biennial Monitoring Report (BMR). The annual report is a complementary source of information on the ongoing P2P partnerships and demonstrates the significant impact they continue to have on the landscape. In future, as the Horizon 2020 Partnerships fade out, the report will ensure it complements sources, such as the BMR, with additional data on Horizon Europe Partnerships as well as providing the results of strategic analysis and other work undertaken by ERA-LEARN.

This 10th annual report, from the ERA-LEARN project, commences with an overview of the strategic outputs of ERA-LEARN during 2024 and then provides a statistical update on the evolving P2P landscape in relation to calls, committed budgets and transnational projects. It introduces, where possible, data related to the Horizon Europe partnerships and acknowledges the wider landscape in which both Horizon Europe and Horizon 2020 Partnerships currently sit.

Note that additional statistics are available on the ERA-LEARN [website](#).

In line with previous reporting, the main partnerships covered by this report are segmented into eight types:

- ERA-NET Cofund (the Horizon 2020 ERA-NET Cofund instrument)
- EJP Cofund (European Joint Programme)
- JPIs (Joint Programming Initiatives)
- Article 185 Initiatives
- ERA-NET FP6 (the FP6 Coordination and Support Actions)
- ERA-NET FP7 (the FP7 Coordination and Support Actions)
- ERA-NET+ (the FP7 ERA-NET Plus Instrument)
- Self-Sustained Networks (P2P networks that continue implementing joint calls after the end of the EU funding)

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1 Analysis of Cofund Partnerships is shown for both the EU co-funded joint calls and the additional calls (without EU co-funding)



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## **Limitations**

The majority of the information and statistical analysis contained in the report is based on factual data provided by the partnerships themselves but there are some limitations and gaps. In such cases, informed estimates have been made so that the scale and diversity of the joint calls are fully apparent.

The ERA-LEARN team and the Commission rely on data that comes directly from the partnerships in relation to calls and projects to ensure we can provide the community with the most accurate and up-to date information and analysis available. It is, therefore, important that we can count on the continuing support of those partnership coordinators and call secretariats that have been kind enough to provide the necessary data, year on year, that helps us to improve the overall quality of the aggregated data.

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## **Acknowledgements**

The ERA-LEARN team would like to sincerely thank the partnerships that have provided the detailed datasets to support production of this report and the additional statistics available from the ERA-LEARN website; as well as feeding into other strategic analysis by the EC and ERA-LEARN. We very much appreciate this ongoing support.

We would also like to thank Lucas van Hattem at the European Commission for his valuable insight and guidance to support this process.

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## **Feedback**

Any comments on this report and/or suggestions for future reports may be addressed to [hayley.welsh@optimat.co.uk](mailto:hayley.welsh@optimat.co.uk).

## 2. ERA-LEARN in 2024

The work of ERA-LEARN in 2024 built on the experience and knowledge gained over several previous phases of the project and we continue to support the needs of the evolving partnership landscape, addressing relevant policy issues, providing guidance and helping to overcome challenges faced by the partnerships.

A summary of various strategic outputs from ERA-LEARN's work during 2024 is provided here.

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### **European Partnership Stakeholder Forum 2024**

On 4 and 5 December 2024, the European Partnership Stakeholder Forum returned to Brussels to mark a significant milestone: twenty years of European Partnerships. Organised by the European Commission, in collaboration with ERA-LEARN, the forum brought together over 400 participants from across Europe and beyond - representatives of national and regional governments, public research funders, industry, academia, and policymakers - to reflect on past achievements and help chart the course for the next generation of partnerships under the forthcoming 10th Framework Programme (FP10).

The event also provided the platform for the first public appearance of Ekaterina Zaharieva, the newly appointed Commissioner for Start-ups, Research and Innovation. In her opening address, she underlined the political importance of partnerships in the EU's evolving research and innovation (R&I) landscape. *"Closing the innovation gap is at the centre of the new competitiveness compass,"* she stated, affirming that partnerships will continue to play a key role, but must be agile enough to evolve. She laid out five policy priorities for her mandate, including strengthening R&I ecosystems, improving capital access, focusing on critical technologies, ensuring inclusivity, and delivering a forward-looking successor to Horizon Europe.

These reflections were echoed in keynote speeches by Giorgio Gori, MEP and Vice-Chair of the ITRE Committee, and László Bódis, Deputy State Secretary for Innovation representing the Hungarian Presidency. Both stressed the need for increased investment, administrative simplification, and stronger alignment between EU and national efforts.

The two-day event combined plenary sessions, panel discussions, thematic workshops, and networking activities, offering a space not just to take stock, but to critically engage with the present and future challenges facing European Partnerships. For the first time, the event also introduced a matchmaking tool for networking and included pitch talks from four Partnerships: Innovative Health Initiative, Photonics, Sustainable Blue Economy, and EIT Manufacturing.



The thematic sessions of the forum, on Day 1, provided valuable insights into the opportunities and challenges facing European Partnerships across a wide range of sectors. Organised around the Horizon Europe Clusters, the discussions covered areas such as digital health, industrial innovation, energy, mobility, and environmental sustainability. Common themes emerged across sessions, with participants emphasising the importance of aligning research agendas with industry needs and policy goals, improving stakeholder engagement, and fostering synergies across partnerships. The use of artificial intelligence in healthcare raised questions around ethical data use and regulatory preparedness, while industrial-focused partnerships highlighted the need for early industry involvement in shaping strategic agendas and portfolios. In discussions on governance and implementation, participants called for the simplification of procedures, improved tools for managing co-funded partnerships, and greater clarity around roles and responsibilities. Many pointed to the value of structured collaboration, through joint roadmapping, shared infrastructure, and coordinated communication, as key to achieving long-term impact. The sessions highlighted a shared commitment to increasing coherence and efficiency in how partnerships operate, while recognising the need for flexibility and support in navigating complex administrative and strategic environments.

The second day focused on shaping the future of partnerships. The sessions explored how to build a coherent portfolio, streamline implementation, and strengthen multi-actor collaboration. A key takeaway was the need for flexibility *“one size fits none.”* Discussions addressed trade-offs in thematic scope, priority setting, and the importance of synergy over duplication. The closing plenary featured the PKH Opinion on FP10 where the “innovation paradox” was highlighted and the need to position partnerships more strategically as drivers of systemic change was stressed.

The 2024 Partnership Stakeholder Forum once again provided an essential platform for coordination, reflection, and forward planning within the partnership community. Celebrating two decades of progress, the event confirmed the enduring value of Partnerships but also highlighted that their future success depends on adaptability, coherence, and continuous engagement.

A full report of the event (summarising the key messages that were drawn from the discussions), as well as video recordings of the sessions and the full agenda for the Forum, is available on the [ERA-LEARN website](#).

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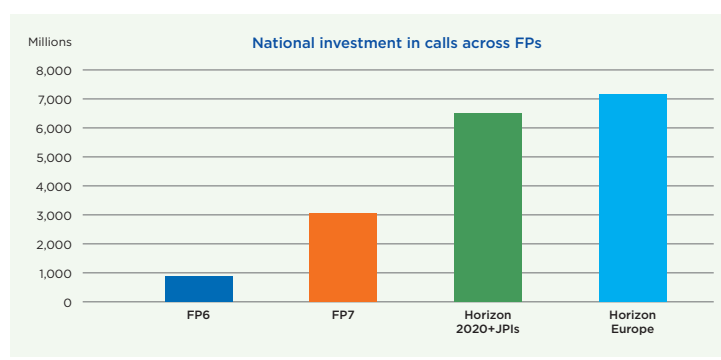
## ***Two Decades of European Partnerships Brochure***

This report, produced by ERA-LEARN, marks two decades of European Public-to-Public Partnerships, highlighting their significant role in shaping Europe’s collaborative research and innovation environment. Over 20 years, these partnerships have driven coordinated national and European R&I strategies, leveraged substantial investments and fostered extensive international collaboration.

Financially, the Partnerships have mobilised impressive resources, with over Euro 10 billion invested by member countries in partnership funded projects from FP6 through Horizon 2020, and over Euro 7 billion already committed under Horizon Europe. This sustained investment has significantly expanded the scale and scope of projects, growing from approximately 1,500 participations in the early phases to nearly 30,000 in recent years.

### Partnerships in Numbers

Over €10 billion invested, to date, by countries in partnership-funded projects between FP6 and Horizon 2020 and over €7 billion already committed in Horizon Europe partnership calls.



### Two Decades of European Partnerships

*Our Achievements*

The report presents diverse case examples, illustrating the broad thematic reach and tangible impacts of the partnerships. These examples span critical societal challenges including energy transition, climate action, healthcare innovations, digital transformation, and sustainable urban development. Notably, the European Metrology programmes (EMRP and EMPIR) alone have demonstrated an economic impact of Euro 1.6 billion through innovative products, with significant social impacts in health, environment, and energy. Similarly, partnerships such as Clean Hydrogen have positioned Europe at the forefront of hydrogen technologies, with landmark projects like GrInHy2.0, the world's largest high-temperature electrolyser.

The case studies illustrate various pathways to impact, from technological advancements and market creation to policy uptake and social innovation. Projects have actively engaged stakeholders across sectors, supported SMEs and start-ups, and created frameworks for effective governance and collaboration.

Looking forward, the report emphasises the importance of continued strategic coherence, simplified governance, and enhanced stakeholder involvement. As European Partnerships evolve, these elements will remain crucial for driving innovation, addressing emerging global challenges, and strengthening Europe's competitive edge in research and innovation.

The brochure can be accessed and downloaded from the [ERA-LEARN website](https://era-learn.eu).

## Toolbox and guidance on mechanisms for synergy creation for European Partnerships

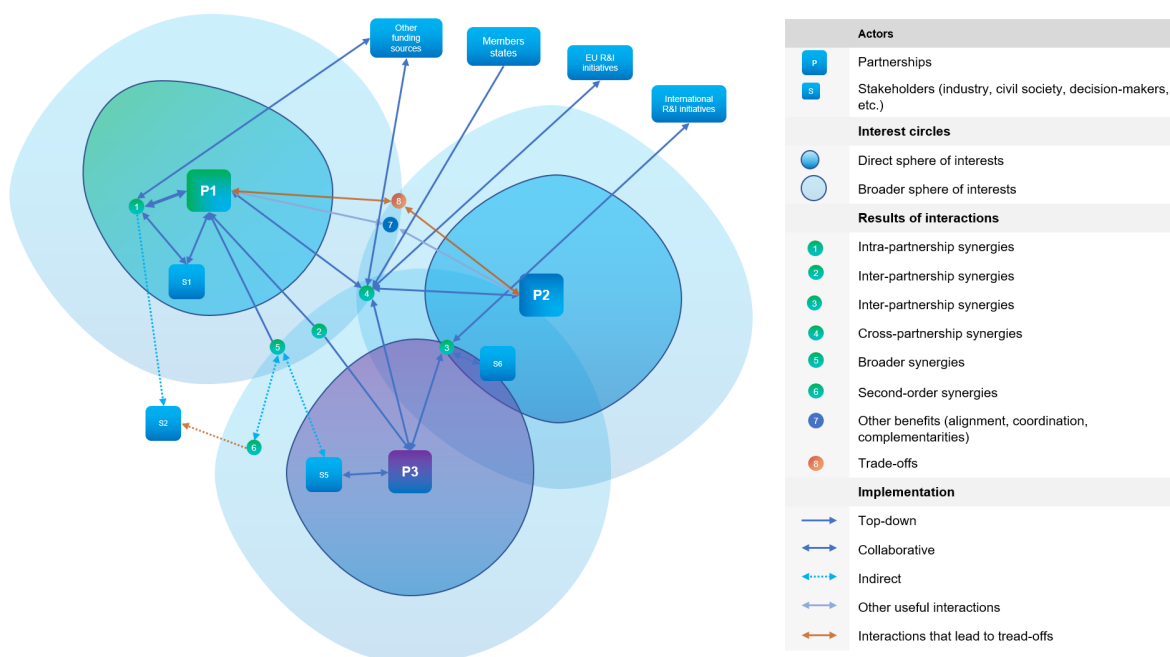
The ERA-LEARN guidance document on mechanisms for synergy creation is an essential strategic resource developed to enhance the effectiveness and impact of European Partnerships. Published as part of ERA-LEARN's mission to strengthen partnership programmes across Europe, this guidance responds directly to the growing complexity and interconnectedness of R&I policy, addressing the imperative of leveraging synergies for transformative impacts.

The primary aim of the guidance is to provide clear methodologies and practical tools to help partnerships navigate and achieve synergies. These synergies, as defined by the guidance, represent interactions between stakeholders that produce results exceeding those achievable through independent efforts alone. Recognising this, the document explores mechanisms structured around six core purposes crucial to synergy creation: exploring needs and opportunities, uniting behind common goals, developing shared governance, leveraging internal and external resources, improving knowledge valorisation, and accelerating sustainability transitions.

Key sections detail methods tailored to each purpose, accompanied by illustrative examples from established partnerships. For instance, joint foresight activities facilitate strategic vision-building to address shared challenges. Similarly, collaborative mapping exercises help identify gaps and opportunities for joint action in fields such as biodiversity research infrastructures. The document further outlines mechanisms like inter-partnership assemblies and stakeholder consultations and highlights examples of partnerships that have successfully employed these.

The guidance emphasises not only the practical methodologies but also the critical role of stakeholder engagement and knowledge valorisation. By integrating diverse perspectives and expertise, partnerships can effectively pool resources, enhance decision-making, and create innovative solutions. It further stresses the necessity of streamlined governance structures and reduced administrative complexities, aligning with the broader EU objectives of efficient resource utilisation and sustainable, inclusive growth.

The full guidance document can be found on the [ERA-LEARN website](#).



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## ***Guidance on international cooperation for European Partnerships***

ERA-LEARN published a guidance document on international cooperation for European Partnerships, providing strategic direction and practical tools that are designed to enhance global collaboration within Europe's R&I community. The guidance document addresses the growing need for robust and strategic international relationships amid evolving geopolitical contexts and global challenges.

The guidance was created to help partnerships effectively navigate international cooperation, highlighting the critical motivations for and potential challenges of engaging globally. It outlines key rationales including addressing global challenges, accessing leading R&I communities, and coordinating international research and innovation roadmaps. It notes how international cooperation can increase the visibility and influence of European research, promote innovation uptake, and support Europe's strategic autonomy.

The guidance identifies several challenges associated with international cooperation, such as differences in perceptions of European Partnerships, complex administrative and legal barriers, geopolitical tensions, and cultural differences in research practices. To manage these effectively, clear strategic planning, sustained dialogue across policy areas, and dedicated resources to foster trust and mutual understanding are needed.

Structured around essential components, the guidance details new framework conditions under Horizon Europe, promoting openness while balancing strategic autonomy. It also offers practical advice on defining international cooperation activities, selecting strategic regions and partners, and integrating international stakeholders within European Partnership activities.

A copy of the guidance document can be found on the [ERA-LEARN website](#).



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## ***Workshops and Webinars***

During 2024, ERA-LEARN organised, and supported the Commission to deliver a number of webinars and workshops to provide information and support to partnerships, addressing specific areas of concern or interest. Some key events to note, from 2024, are:

### ***— Expert Group Report on the Interim Evaluation of Horizon Europe - Launch Event***

ERA-LEARN supported the launch event for the report of the expert group on the interim evaluation of Horizon Europe, which took place on 16 October 2024.

The expert group, chaired by Professor Manuel Heitor, shared insights and recommendations to help Horizon Europe adapt to emerging challenges, enhance its appeal to researchers and innovators as well as maximise the programme's value throughout the remainder of its implementation.



— **Launch Event of the 2nd Biennial Monitoring Report (BMR)**

The online launch event of the 2nd Biennial Monitoring Report (BMR) on Partnerships under Horizon Europe was held on 19 September 2024. The event began with a presentation of the key findings of the report by the Commission and the Expert Group on support of the strategic coordinating process, followed by a panel discussion on *“the contribution of European Partnerships to the EU priorities and the BMR as a monitoring tool”*. The panel included the chair of the former expert group, a country representative from the Partnership Knowledge Hub (Norway), a representative of the Sustainable Blue Economy Partnership (co-funded) and a representative of the Made in Europe Partnership (co-programmed).

The BMR aims to provide a strong evidence base to guide the implementation of partnerships and inform strategic discussions on the effectiveness of the new policy approach to European Partnerships and, where relevant, how this should evolve. This is the second in a series of four BMRs with publication dates in 2022, 2024, 2026 and 2028.

— **Workshop on Administrative Burden of European Partnerships in Horizon Europe**

Following a survey (for the members of the Partnership Knowledge Hub), launched in March 2024, the European Commission, with ERA-LEARN, co-organised a physical workshop with the aim of gaining a deeper in-depth understanding of the administrative burdens facing the European Partnerships. The physical workshop took place in Brussels on 5 June 2024.

The aims of the workshop were to:

- Present and analyse the outcomes of the survey on the Administrative Burden of European Partnerships under Horizon Europe
- Have a more in-depth analysis of the current administrative burdens and a discussion on how these burdens could be limited both in the current and in the next Framework Programme (FP10). The consultation was divided into two main sections: 1) feedback on the current burden; 2) feedback on the possible measures addressing the burden in the future with a long-term perspective
- Give the participants a forum to express their experiences and concerns

The Participants of the workshop were the members of the Partnership Knowledge Hub (Member States and Associated Countries representatives) and the observers therein (co-funded, co-programmed and Institutionalised partnership representatives).

— **Webinar on issues of Co-funded European Partnerships – definition and implementation of additional activities beyond joint calls**

Co-funded European Partnerships face challenges in defining and executing additional activities beyond joint calls (“in-kind” contributions). In an effort to resolve these challenges, the European Commission and ERA-LEARN organised a webinar on this topic, which took place on 24 January 2024.

The aim of the webinar was to explain the concept of “additional activities” with a short presentation by the European Commission on the general principles, a clear practical example from a co-funded European Partnerships that has already been successful in executing these additional activities and two simulations. A discussion on (common) challenges that the co-funded European Partnerships are facing, and their specific experiences, also helped to facilitate the exchange of good practices and learnings.

Note that the agendas, video recordings, presentations, and Q&A outputs for all workshops and webinars can be found on the [ERA-LEARN website](#).

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## Country Reports

In order to describe the performance of a country in European R&I Partnerships within the context of their own national and regional research and innovation systems, we regularly develop and publish country reports. Previous reports covered Poland, Austria, Spain, Belgium, Finland and Norway, Germany, Estonia and France, and in 2024, the 9th Country Report on Austria was published and can be found on the [ERA-LEARN website](#), with some highlights provided here.

The Austria country report provides a detailed analysis of the evolution of Austria's participation from Horizon 2020 through to Horizon Europe, providing insights into how Austrian institutions, governmental bodies, and the private sector collaboratively engage and contribute significantly to transnational R&I initiatives across Europe.

Austria is particularly active in European Partnerships, participating in approximately 95% of those relevant to its national research priorities within Horizon Europe. This reflects the country's strategic intent to foster collaboration at a European level, positioning the country as a strong participant in joint research activities. Notably, Austria coordinates two of the 16 Partnerships, which demonstrates its commitment and capability in leading high-profile, collaborative research efforts.

Financial investment in European Partnerships has increased significantly, highlighting Austria's prioritisation of cross-border R&I initiatives as a strategic way to achieve impactful outcomes. It also demonstrates the country's dedication to both aligning its national research agenda with European priorities and leveraging collective resources to effectively address important societal challenges.

Austria's performance in Horizon Europe funding calls has been notably successful, consistently achieving high success rates. The report emphasises Austria's strengths in several specialised fields - particularly in quantum research, biotechnology, and smart grid technologies - and shows its competitive edge and capacity for innovation in sectors crucial to Europe's broader strategic objectives, including digital and green transitions.

The report further highlights Austria's robust track record in fostering effective public-private partnerships and producing impactful international co-publications. This indicates a strong interdisciplinary approach, bringing together diverse stakeholders from academia, industry, and public institutions, which enhances the depth and applicability of research outcomes.

Strategically, there is significant alignment between Austria's national R&I initiatives and broader European missions, prominently reflected in the national RTI Strategy 2030. Austrian ministries have shown increased initiative in governance and coordination, effectively integrating national and European objectives. Such alignment ensures coherence in research priorities and facilitates smoother implementation of collective projects and partnerships.

Despite these considerable achievements, the report also identifies several operational and strategic challenges, with some of the key challenges noted by stakeholders being the complexity of administrative procedures, fragmented governance structures that can impede effective coordination, and the potential for overlapping thematic areas within partnerships. Addressing these challenges through improved governance structures, streamlined procedures, and enhanced communication between stakeholders remains a critical priority for maintaining efficiency and effectiveness.



The research undertaken shows that Austria is well-positioned to continue playing a significant role in driving innovation, addressing complex global issues, and bolstering Europe's competitive advantage on the international stage through its active contribution to the European Partnership landscape.

Note that two further reports were published in early 2025 (Slovenia and Italy) and these can also be found on the [ERA-LEARN website](#).

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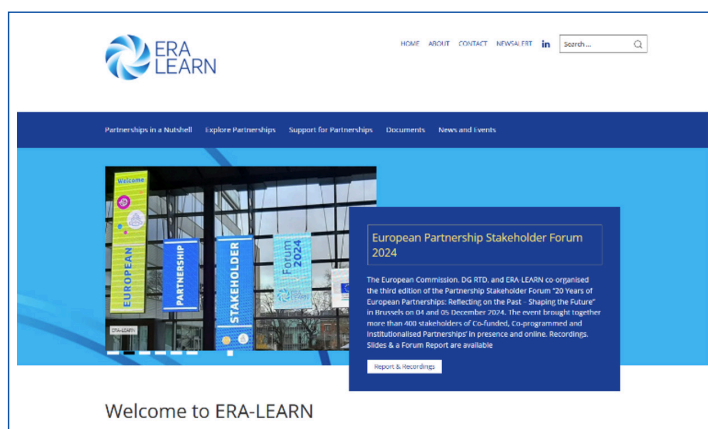
## ERA-LEARN Website

The ERA-LEARN platform remains a central resource for the European Partnership community, offering a wide range of tools, data, and guidance to support those involved in the design, implementation, and evaluation of partnerships. It continues to evolve to ensure it provides the most up-to-date and relevant content to help funders, policymakers, coordinators, and practitioners navigate the complexities of the R&I partnership landscape.

The platform continues to offer a number of core services that include:

- A comprehensive partnership database that tracks more than 300 partnerships (past and present) across EU Framework Programmes. Users can explore detailed information on governance models, thematic focus areas, participating countries, funding calls, and supported projects
- The ERA-LEARN toolbox, which contains practical guidance and resources on topics such as implementing joint calls, evaluating partnership impact, international cooperation, stakeholder engagement, and synergy creation. It also includes templates, manuals, and the R<sup>2</sup>IPE (Revised Research and Innovation Partnership Evaluation) toolkit for assessing impact
- Access to evidence and strategic insights, including thematic studies, country profiles, and analytical outputs that help inform policy and improve the design and performance of partnerships
- Opportunities for training and mutual learning, such as webinars, workshops, and networking events. These cover key topics including widening participation, building synergies, and good practices in partnership implementation
- Ongoing communication and updates through the ERA-LEARN newsletter, news items, and social media channels to keep the community informed about developments in Horizon Europe and the broader European R&I landscape

As the partnership landscape continues to evolve, ERA-LEARN remains committed to supporting the community with up-to-date knowledge, shared tools, and opportunities for learning and collaboration. Users are encouraged to explore the site regularly to take full advantage of what it offers.



# 3. Overview of the Partnership Landscape

In this section of the report, we highlight some key statistics in relation to the transnational joint calls implemented during 2024 and then provide an update on the evolution of the partnership landscape over the period of Horizon 2020, within which there were 18 active partnerships at the end of 2024. Where available, we provide data on calls being launched by the Horizon Europe co-funded partnerships and make comparisons across the different Framework Programmes to demonstrate the growth of the community and the leverage effect of EU funding.

Note that charts related to the full timeframe of the P2P partnerships, since 2004, are included in the Appendix for reference.

## 3.1. 2024 Joint Calls

During 2024, 18 calls within the Horizon 2020 framework closed, with a further 12 calls being implemented (and closed) by the new co-funded partnerships under Horizon Europe. Figure 1 shows a breakdown of the calls, with ERA-NET Cofund calls being most prominent within Horizon 2020. Of the ERA-NET Cofund calls, one was specific to a JPI related partnership, and all were additional calls without EU co-funding.

Note that all Article 185 calls were launched by the PRIMA partnership, which, in 2024, continued to be the only Article 185 implementing transnational joint calls. In 2025, however, it transitions to an institutionalised partnership under Horizon Europe.

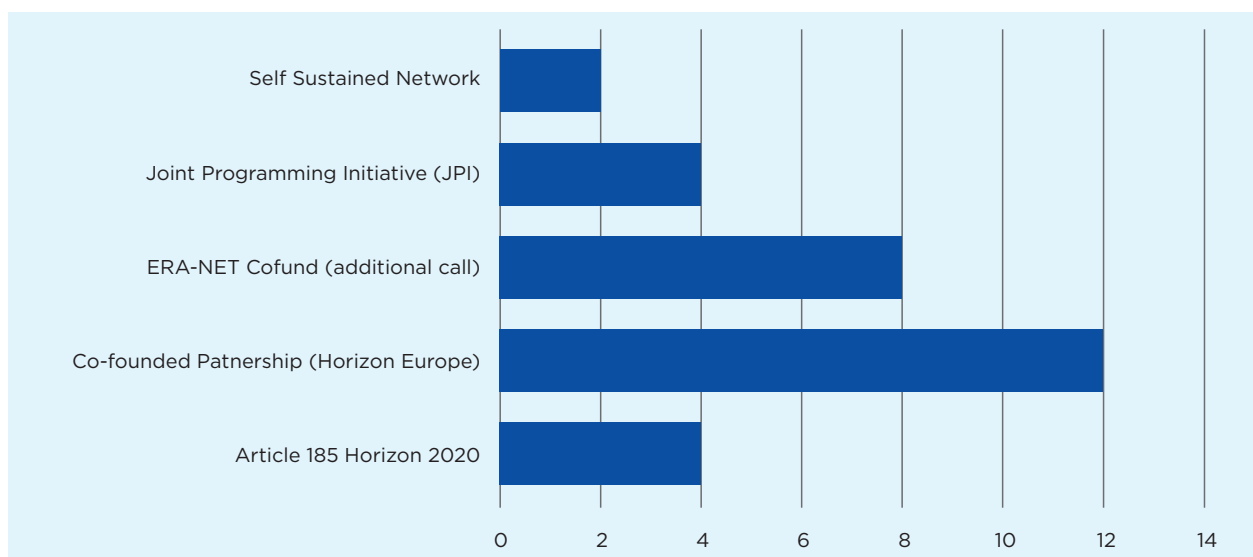


Figure 1: Number of Joint Calls Closing in 2024, by Partnership Type

The number of joint calls being implemented by the Horizon 2020 funded partnerships is clearly declining. Only eight ERA-NET Cofunds closed in 2024, which was the lowest number since 2015, as can be seen in Figure 2, but these calls are clearly being superseded by those implemented by the co-funded partnerships under Horizon Europe.

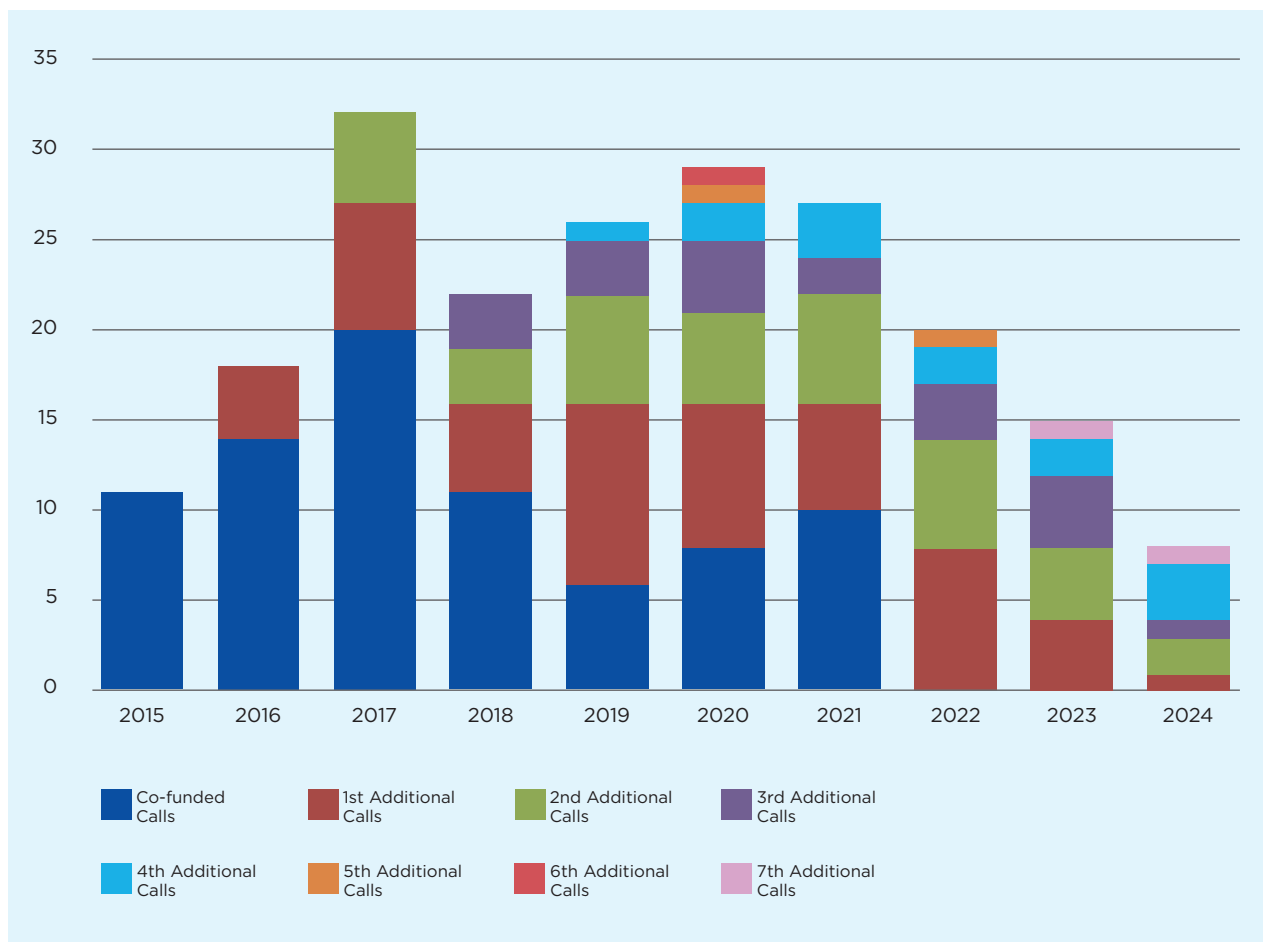


Figure 2: ERA-NET Cofund Calls by Year Call Ended

### 3.2. Joint Calls - Numbers and Funding Commitment

As noted above, there were 18 active Horizon 2020 partnerships going into 2025. During 2024, 10 partnerships formally ended, which inevitably leads to a reduced number of joint calls being implemented. Call activity more generally, however, remains high as many calls now fall under the Horizon Europe framework; it is only by combining the efforts of all these calls that we can see the true reflection of strategic input, alignment and collaboration that is actually taking place across the partnership community.

Since 2004, some 875 joint calls have been implemented across FP6, FP7 and Horizon 2020, including the JPIs. This includes calls that were launched, but not yet closed, by the end of 2024. If we include the co-funded partnerships under Horizon Europe, this number increases to 901.

Under Horizon 2020, the P2Ps, including the JPIs and self-sustained networks, have launched 482 joint calls, as can be seen in Figure 3. Since 2015, 198 ERA-NET Cofund calls have closed, 121 of which have been additional joint calls with no EU co-funding (61% of all ERA-NET Cofund calls), demonstrating the leverage effect of the initial EU co-funding.

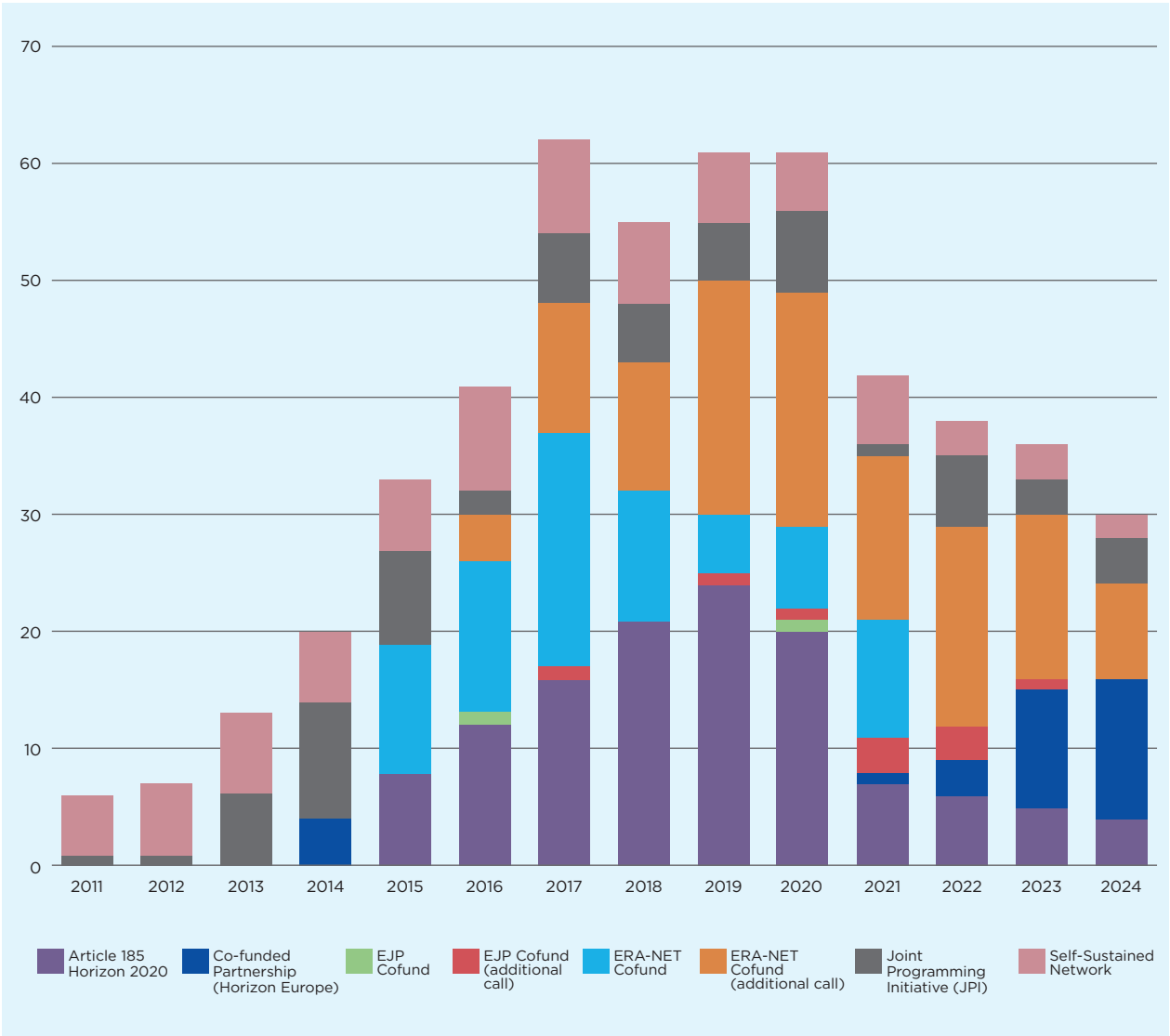
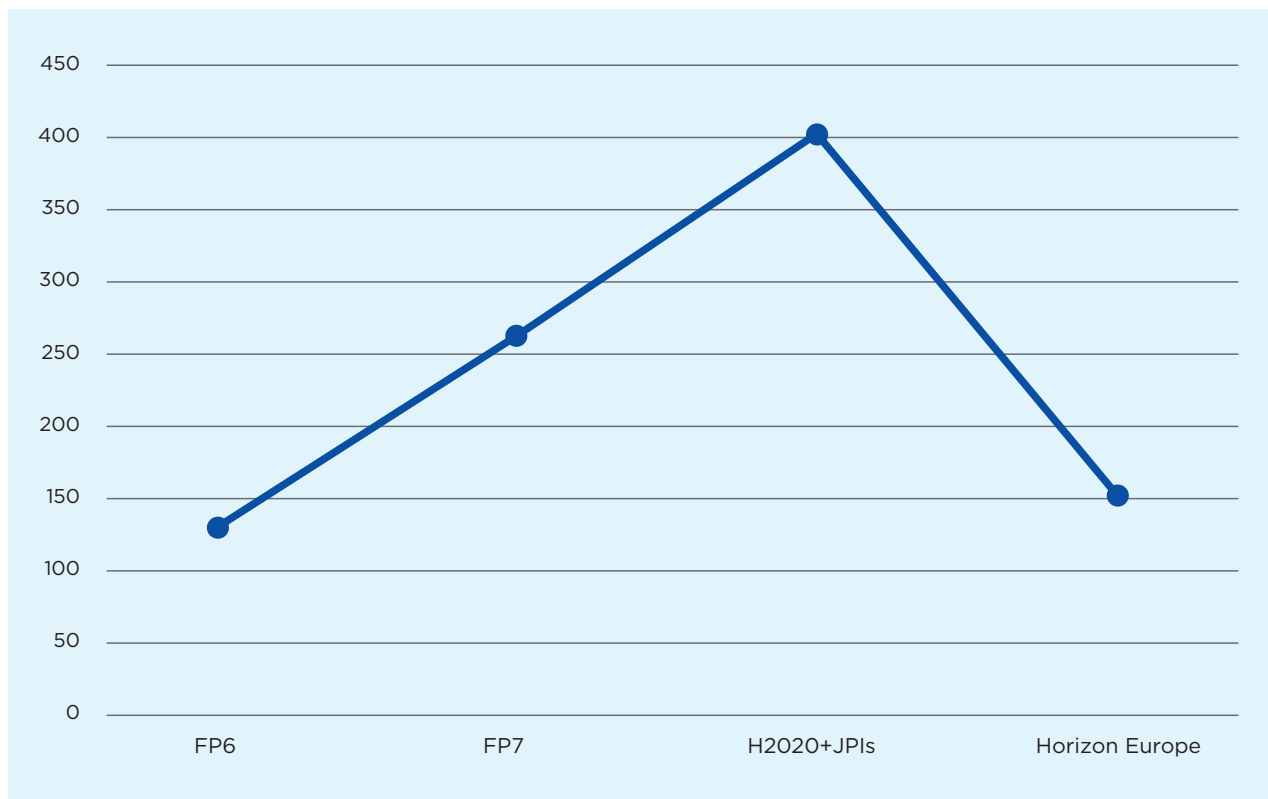


Figure 3: Number of Joint Calls (closed) under Horizon 2020 and by Co-funded Partnerships, by Partnership Type

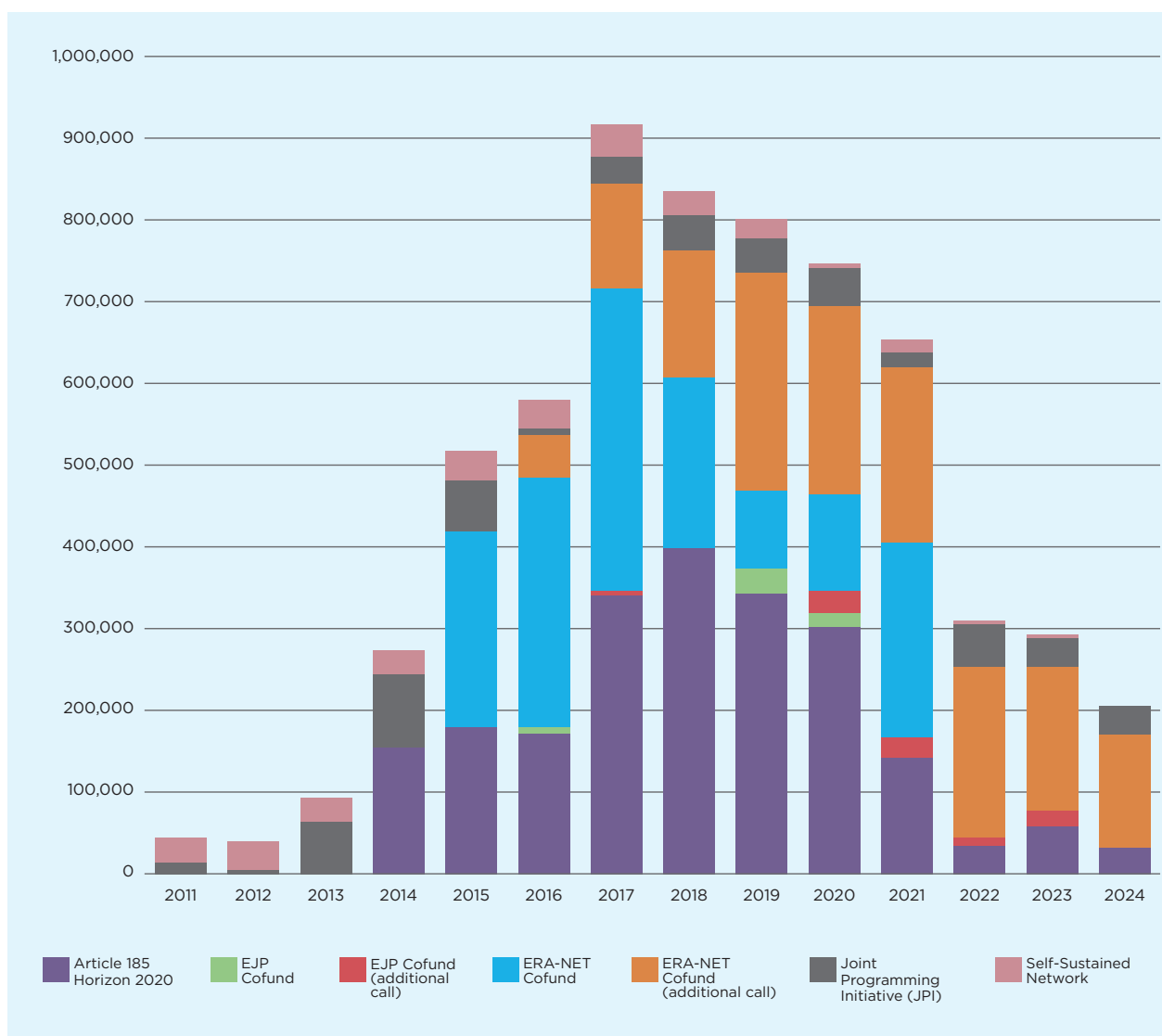
In Horizon Europe, 26 co-funded partnership calls also closed by the end of 2024. In 2025, it is expected that at least a further 14 co-funded partnership calls, two ERA-NET Cofund calls and one JPI call will have been completed.

Looking across the different framework programmes, the significance of transnational joint calls is apparent and they continue to be important within the wider partnership landscape.



*Figure 4: Number of Partnership Calls (due to have closed) across Framework Programmes (by the end of 2025) (\* Self sustained Partnership calls are not included in the figure)*

The total national cumulative pre-call budget for all joint calls (excluding Horizon Europe), since 2004, is over Euro 10.2 billion (excluding EU contributions). The annual comparison, by partnership type, and for Horizon 2020 calls, is shown in Figure 5. This demonstrates the intention and commitment of the funding agencies participating in the calls rather than the funds that were actually invested following evaluation of, and negotiation with, the selected transnational projects.

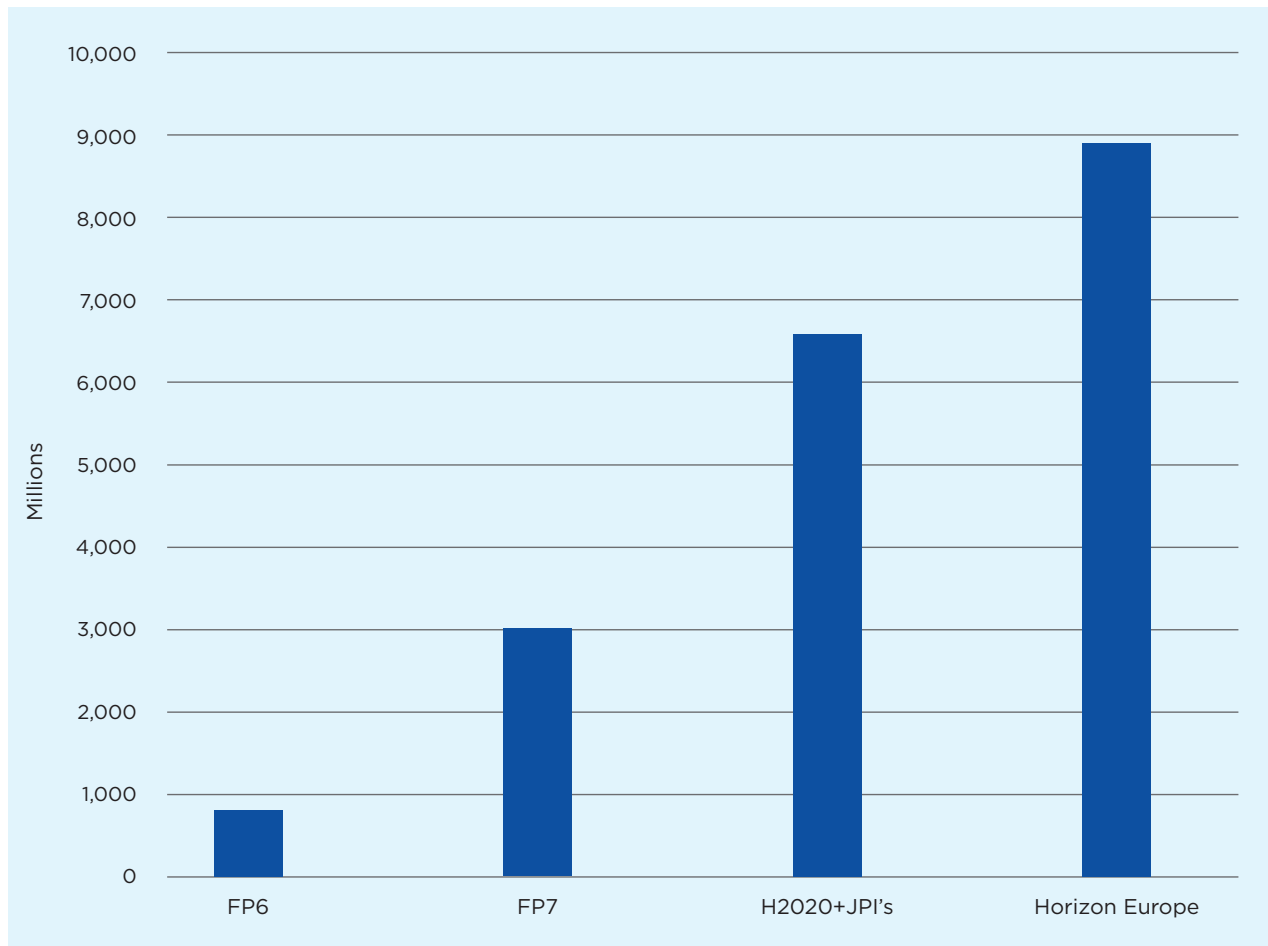


**Figure 5: National Joint Call Commitment for all Calls Closed under Horizon 2020 (incl. JPIs), by Partnership Type**

As expected, the national financial commitment to calls in 2024 continues to decrease in line with the transition of Member State contributions towards Horizon Europe activities. National investment in Horizon 2020 P2P calls, however, still reached more than Euro 205 million in 2024, almost 68% of which was for additional ERA-NET Cofund joint calls without EU co-funding. Given the number of active partnerships, there is clearly a focus, among most, on monitoring funded projects rather than the implementation of new calls.

ERA-NET Cofunds have produced the largest national commitment to joint calls (co-funded and additional calls) since 2015, with a total national commitment to joint calls, since their inception, of more than Euro 3.1 billion.

Funding commitment to Horizon Europe joint calls is also significant, reaching almost Euro 9 billion to date. This highlights the substantially higher budgets allocated to calls in Horizon Europe, compared to previous framework programmes, as shown in Figure 6. Note that this includes all types of partnerships under Horizon Europe and not only the co-funded partnerships.



*Figure 6: National Investment in Joint Calls across Framework Programmes*

### 3.3. Portfolio of Funded Projects

Some 11,000 projects have been funded by the joint calls since 2004. In Horizon 2020, the figure stands at around 7,000 funded transnational projects. Figure 7 shows the annual volume by partnership type for projects funded under Horizon 2020, including the JPIs.

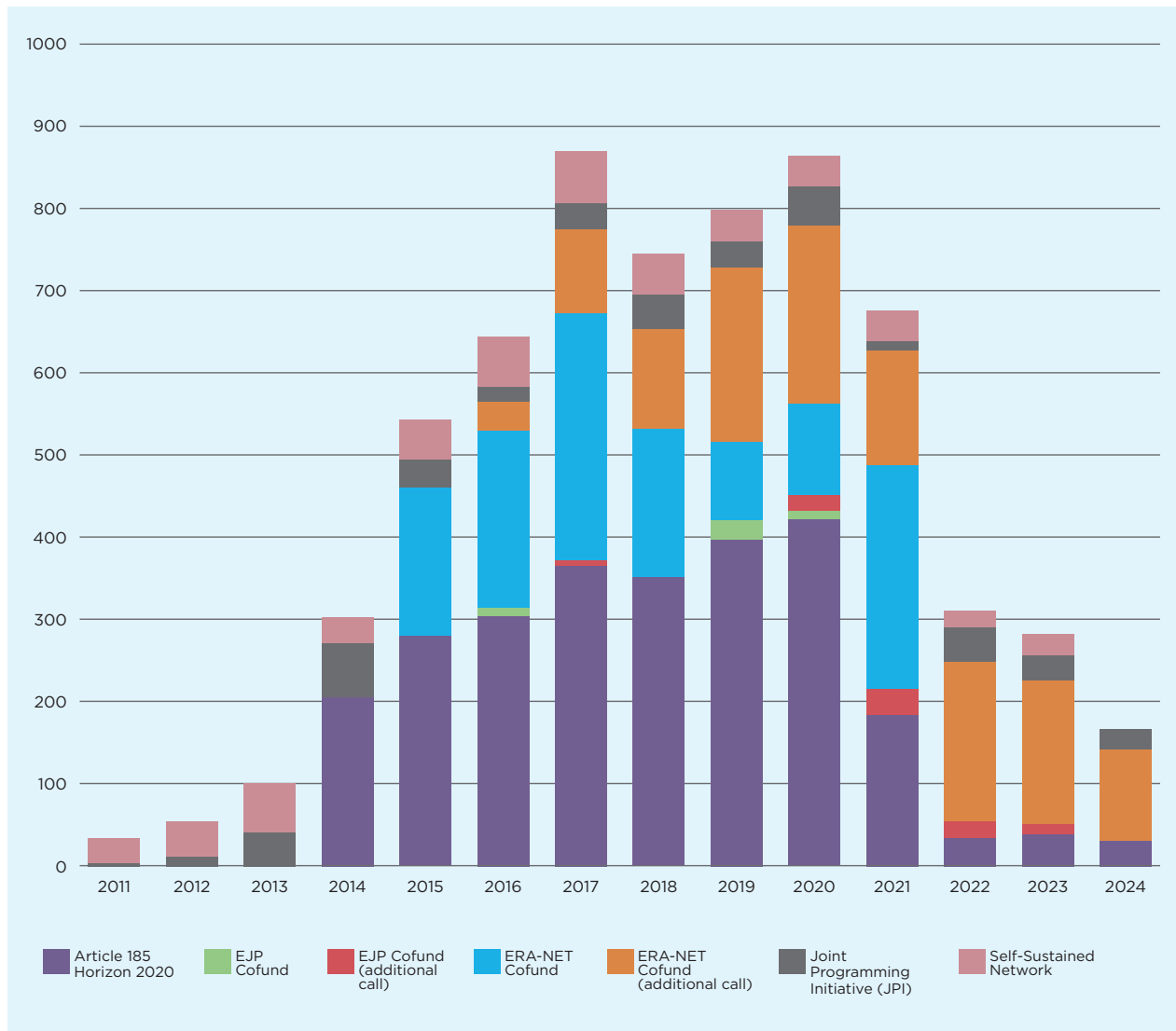
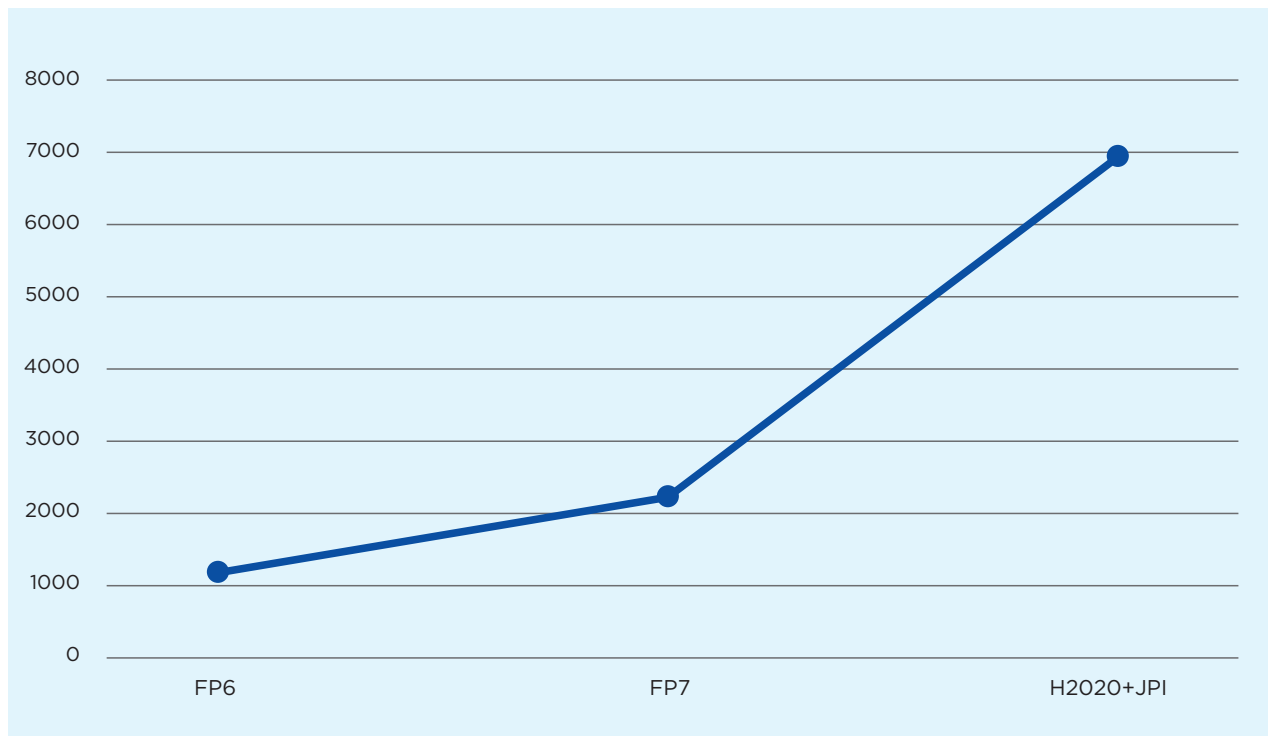


Figure 7: Number of Transnational Projects Funded under Horizon 2020 (incl. JPIs), by Partnership Type

In line with the more limited data available in the short period following the evaluation of proposals, the figures for 2024 are lower than the actual number of funded projects. This is due to the time lag between the joint call being closed and the transnational projects being evaluated and started, which can often be many months. Some partnerships have not yet been able to provide project specific data in relation to their 2024 calls, and the data collection process is ongoing. Note that where no project level data has been provided by the partnerships, an average figure has been applied to the call to allow reasonable assumptions to be made regarding the overall number of projects that have been funded. Historically the figure for the latest year has increased when accurate data has been provided by the partnerships.



The number of projects being funded from P2P calls under Horizon 2020 is notably higher than in previous framework programmes, as can be seen in Figure 8. This is not surprising given that Horizon 2020 represented a substantial leap forward in both funding and ambition.



*Figure 8: Number of Transnational Projects Funded across Framework Programmes*

Comprehensive data on the number of projects funded under Horizon Europe is not yet available, but its collection and analysis is underway.

### 3.4. Thematic Analysis

The societal challenges from Horizon 2020 have evolved into the Clusters in Horizon Europe, with both aimed at addressing broad societal, economic, and environmental challenges. The clustering approach under Horizon Europe, however, re-organises and integrates the themes for greater coherence and impact. This approach is designed to improve alignment with EU policy priorities such as the Green Deal, digital transition, and economic recovery, which build on and refine the societal challenges of Horizon 2020.

An analysis has been carried out of the calls that have been implemented to date under Horizon 2020, with each being mapped to the relevant clusters under Horizon Europe's Pillar II (Global Challenges and European Industrial Competitiveness).

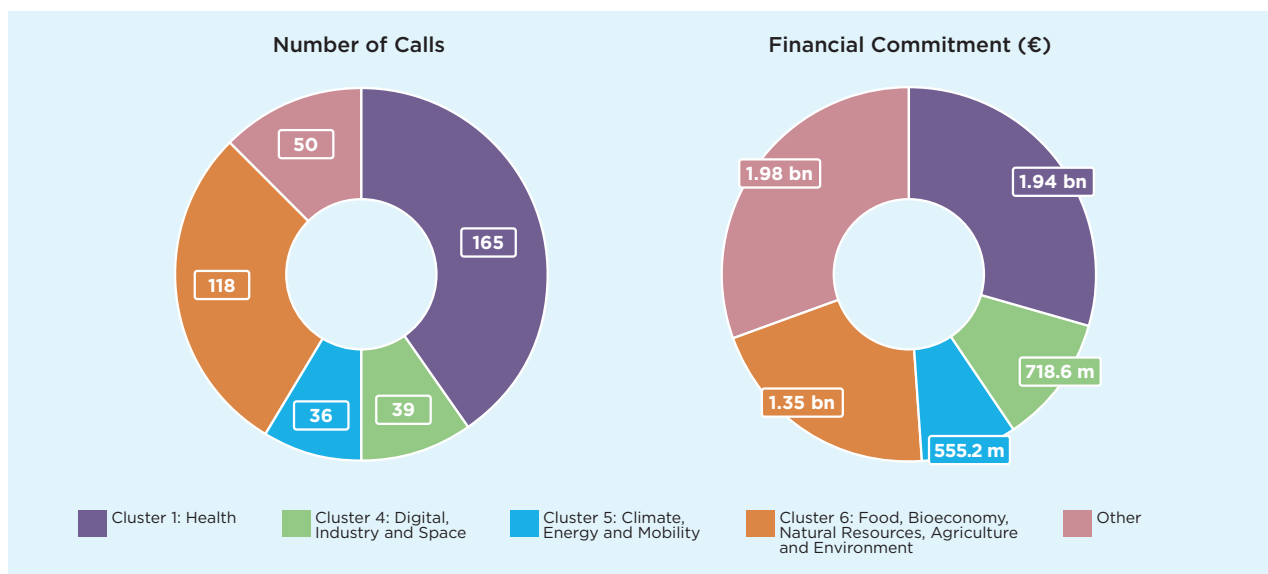


Figure 9: Number of Calls and their Associated Financial Commitment, under Horizon 2020

Figure 9 indicates that calls associated with the Health cluster were most prominent in Horizon 2020, both in terms of the number of calls and the financial commitment to those calls. This emphasis on health is consistent with broader EU strategic priorities, highlighting the continued importance of addressing healthcare challenges at a transnational level.

Cluster 6 (Food, Bioeconomy, Natural Resources, Agriculture and Environment) related calls had the next highest number of calls thus far in Horizon 2020 and these have funded more than a thousand research projects with more than Euro 1.35 billion worth of national investment. This indicates a strong and sustained strategic investment in sustainability, environmental protection, and agricultural innovation, which are crucial for achieving Europe's ambitious Green Deal and sustainable development goals.

While the financial commitment to 'other' thematic areas was slightly higher than for the Health cluster, this comprised calls dealing with cross-cutting activities (e.g. Eurostars) and those topics that closely align with Cluster 2 (Culture, Creativity and Inclusive Society). This demonstrates the importance of innovation beyond strictly defined technological domains.

The high volume of calls and investments observed in Cluster 1 and Cluster 6 closely corresponds with the current structure of Horizon Europe's co-funded partnerships. These clusters host the greatest number of co-funded partnerships under the new framework, which demonstrates how activities under Horizon 2020 have effectively laid the groundwork for ongoing and future initiatives under Horizon Europe.

### 3.5. Comparative Indicators between Countries

It is clear that partnerships under Horizon 2020 continue to make an impact on the landscape, and they have made a huge contribution to the development of the ERA and the strategic coordination process in place today. This section presents a comparative analysis of country-level participation and financial commitments to the P2Ps under Horizon 2020.

Figure 10 highlights the number of transnational joint calls in which each country has participated during H2020 and illustrates the significant variation in country-level participation. Note that, for some countries, more than one national organisation may have taken part in the call, and so the number of participations may be higher than reflected here.

Significantly, seven countries have participated in more than 200 transnational joint calls, with 13 having taken part in more than 150 joint calls each and 22 participating in more than 100 joint calls during H2020, which is almost 80% of countries in the analysis. The most active players also tend to be those that have also coordinated most H2020 Partnerships i.e. Germany, France, Netherlands and Spain. These countries also have a strong strategic commitment to partnerships as well as established infrastructures for managing such extensive engagement.

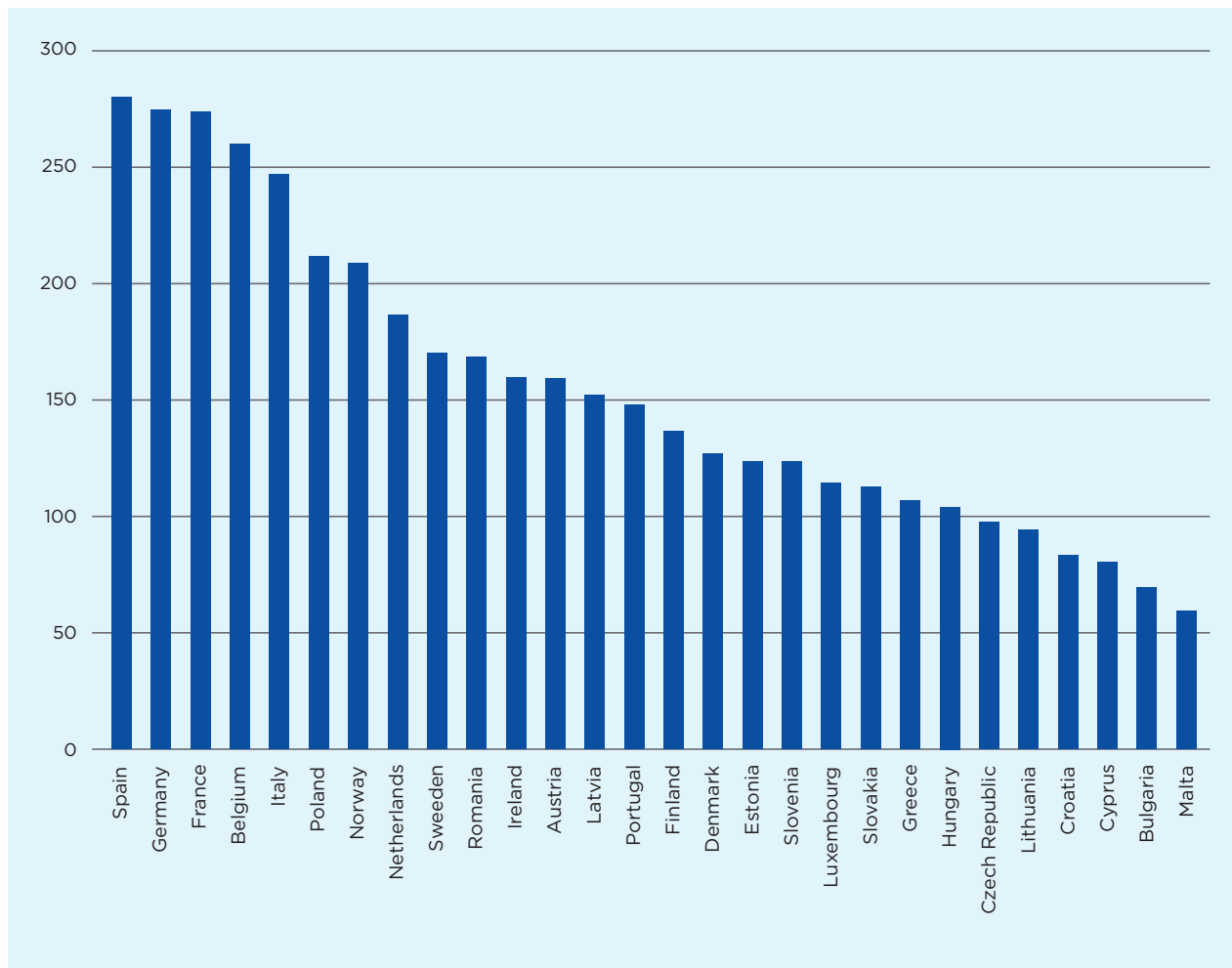
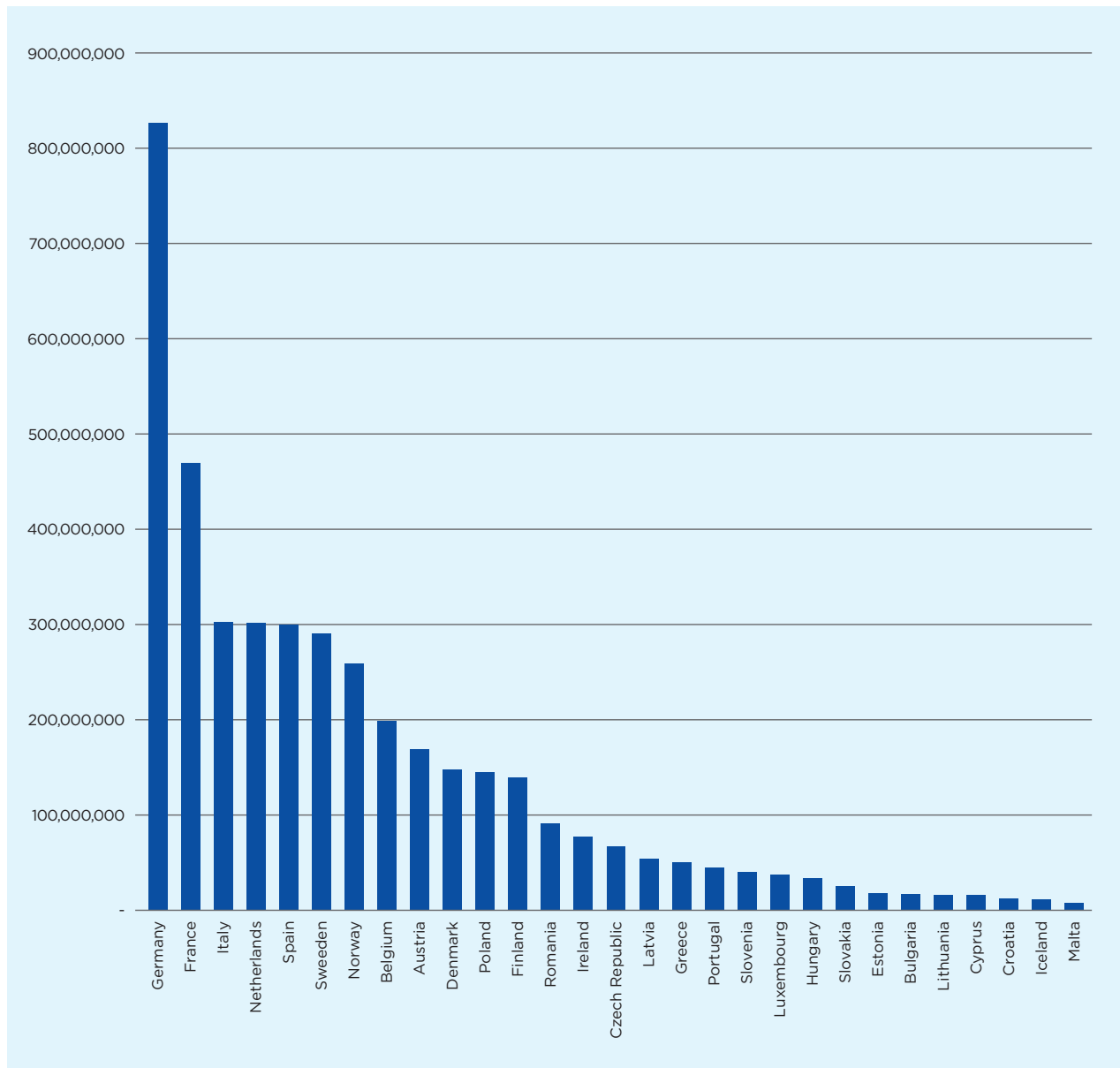


Figure 10: Participation in P2P Joint Calls, by Country, during H2020

In terms of the budgets committed by each country to these calls, figure 11 clearly shows that Germany has committed more than any other country to transnational joint calls in H2020, at the pre-evaluation stage. The most active countries, both in terms of financial commitment and participation in joint calls, are Germany, France, Spain, Italy and Norway, indicating the importance placed on collaborative research within these countries and reflecting their national research capabilities and strategic interest.



**Figure 11: Financial Commitment to Joint Calls, by Country, during H2020**

If we review the national commitment to joint calls in the context of each country's overall government budget allocations for R&D (GBARD), however, we can see that while Germany and France have had the highest absolute financial commitment to H2020 joint calls, it reflects a relatively small proportion of the significant R&D budgets available in these countries. On the other hand, countries such as Latvia, Romania, Malta and Cyprus stand out as having had strong commitment to H2020 joint calls relative to their national R&D budgets, which will have helped to enhance their research capacity and foster innovation through partnerships.

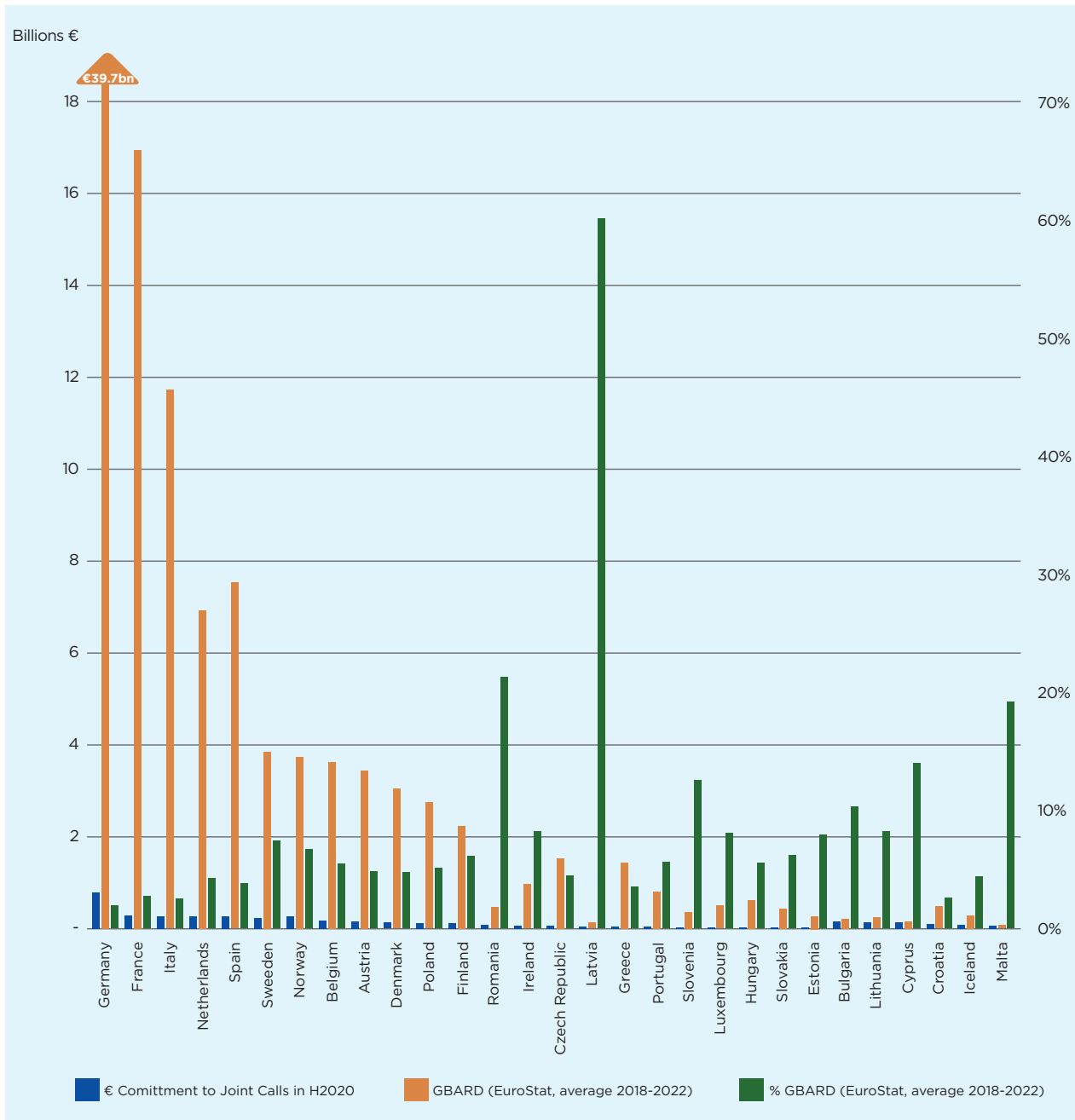


Figure 12: MS/AC Commitment to Horizon 2020 Partnerships compared to GBARD

Looking across the framework programmes, there is a clear upward trajectory in partnership engagement across member states and associated countries, with a broader and deeper participation evident in Horizon Europe compared to Horizon 2020 – see Figure 13. In Horizon Europe, 18 countries have, thus far, taken part in at least 80% of the calls implemented, which is a significantly higher percentage than in Horizon 2020 where participation was less intense. Only five countries took part in more than 60% of Horizon 2020 calls, although the number of calls was significantly higher and these were spread across many more partnerships. It is likely that participation in Horizon 2020 joint calls was more targetted to specific topics relevant to the countries or that participation was more gradual over the period. The more widespread participation in recent calls, however, suggests increasing recognition across Member States and Associated Countries of the strategic benefits offered by European Partnerships.

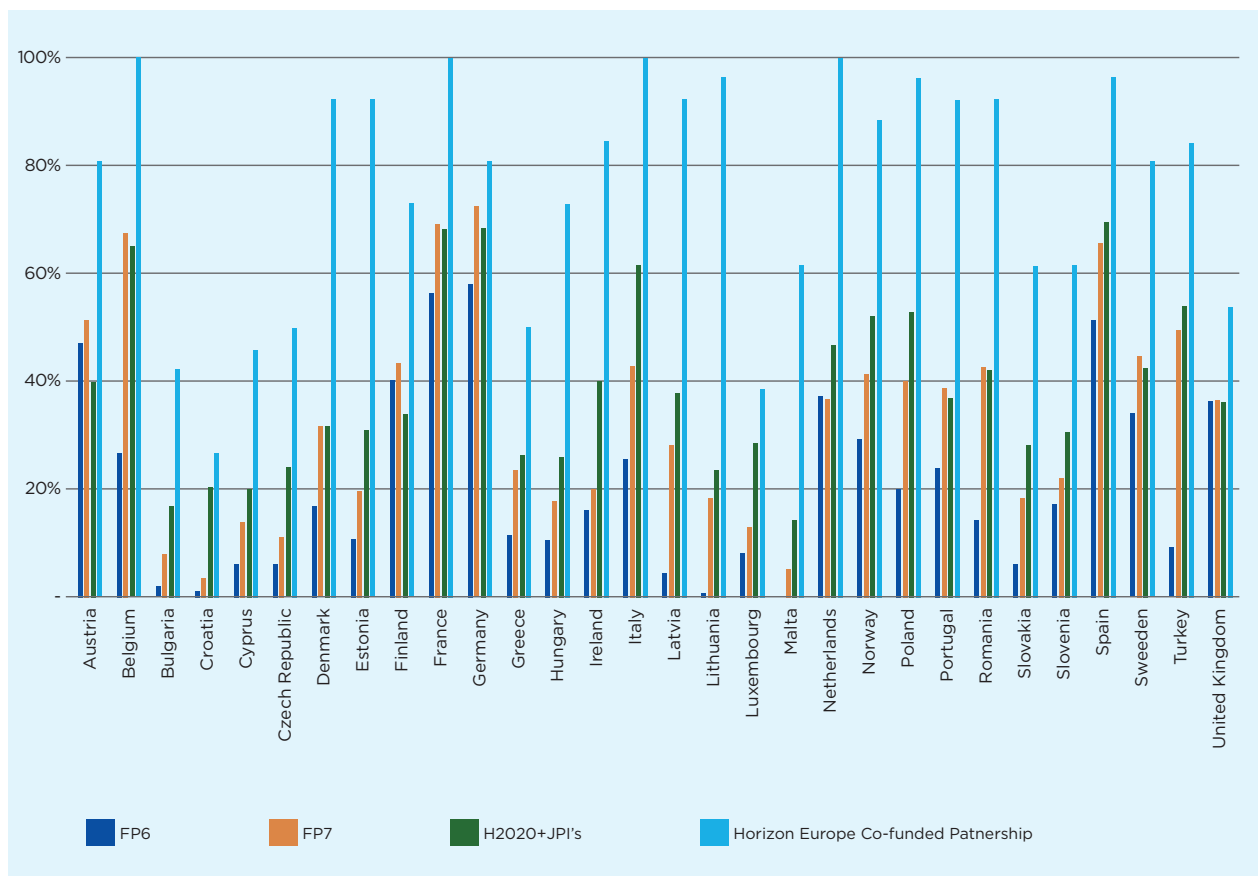


Figure 13: Share of Partnership Call Participation across Framework Programmes, by Country

## 4. Conclusion

The 2024 ERA-LEARN annual report reaffirms the continued importance of Public-to-Public (P2P) partnerships as a cornerstone of European research and innovation policy. As the transition from Horizon 2020 to Horizon Europe continues, partnerships are not only maintaining momentum but evolving in scope, governance, and impact. It is clear that these initiatives remain highly relevant in addressing pressing societal challenges, especially in health, sustainability, and digital transformation.

Differences in national participation and funding levels highlight the diverse strategies and capacities across Member States and Associated Countries. While larger countries dominate in absolute terms, smaller and emerging participants are making notable efforts to integrate into the European R&I landscape through proportional investments that amplify their domestic capabilities.

ERA-LEARN continues to play a vital role in this ecosystem, offering critical support to ensure that partnerships are impactful, coordinated, and responsive to evolving needs.

On a final note, the 2025 Annual Partnership Stakeholder Forum is being co-organised with the European Commission and will take place in Brussels on 3 December 2025. Further details will be published on the ERA-LEARN website in due course as well as via the ERA-LEARN newsletter.

# Appendix

Additional charts are provided here to expand previous data on the partnership landscape since the dawn of the ERA-NETs in 2004.

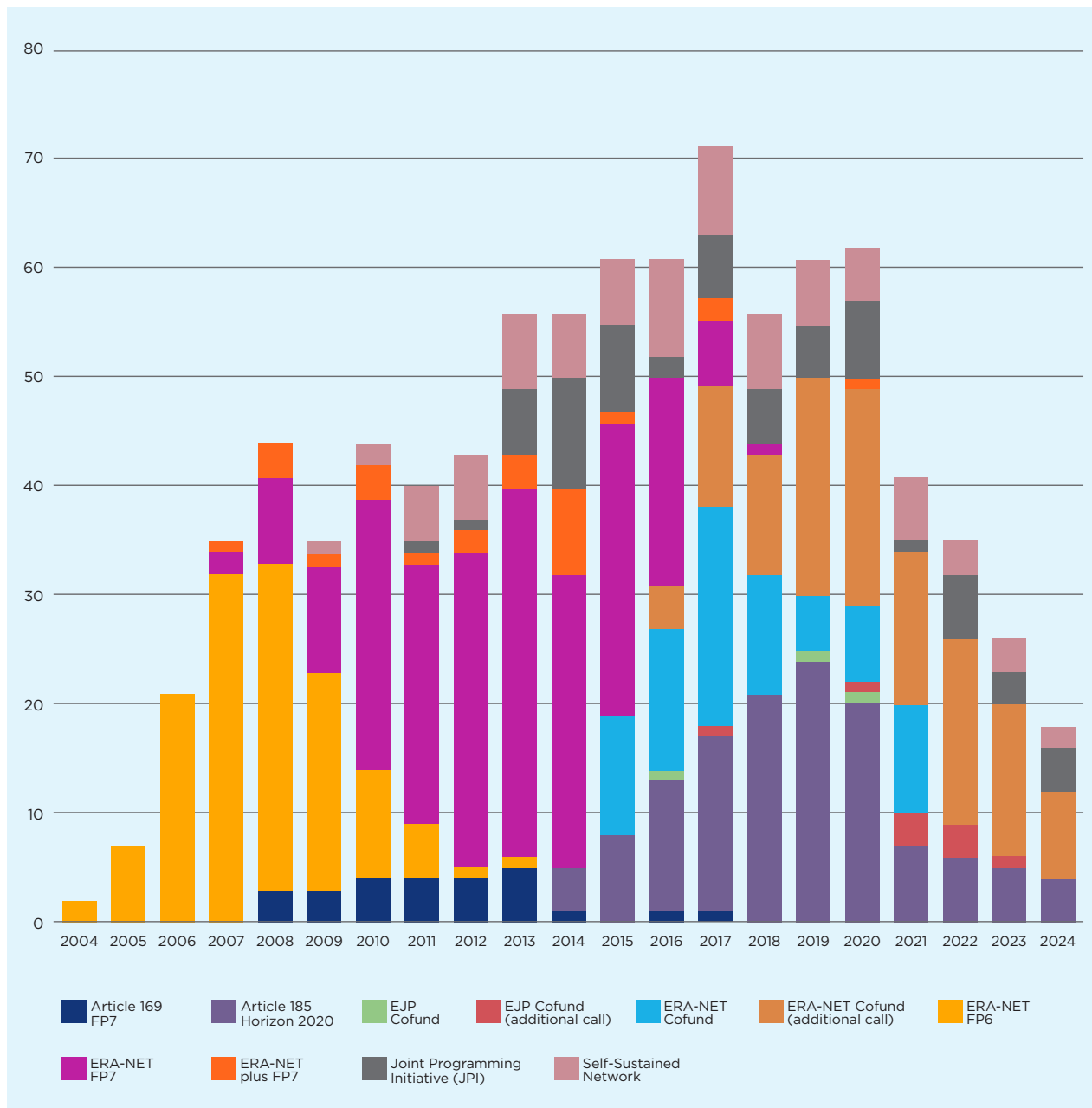
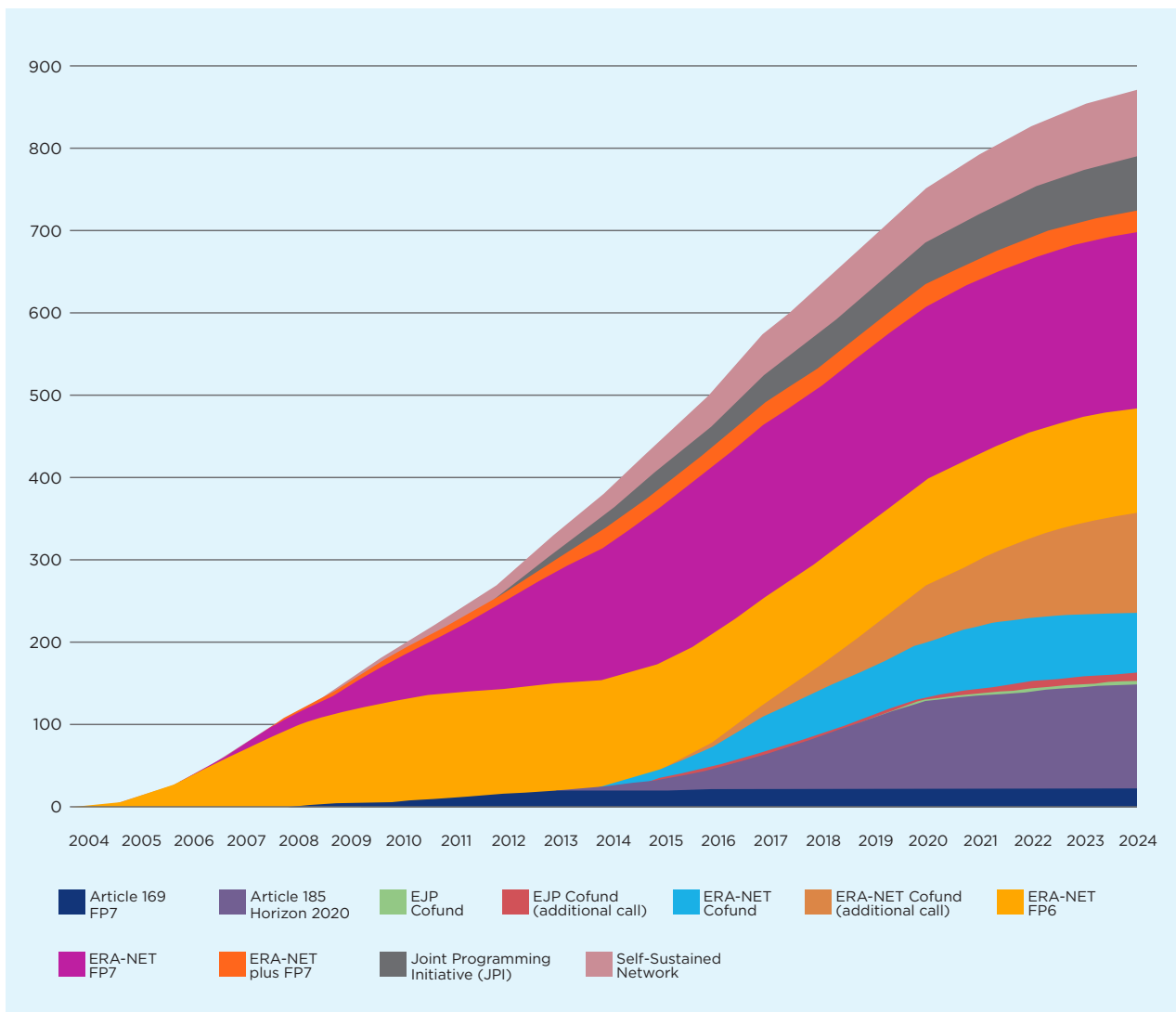


Figure 14: Number of Joint Calls (closed) between 2004 and 2024, by Partnership Type





*Figure 15: Cumulative Number of Joint Calls, Since 2004, by Partnership Type*

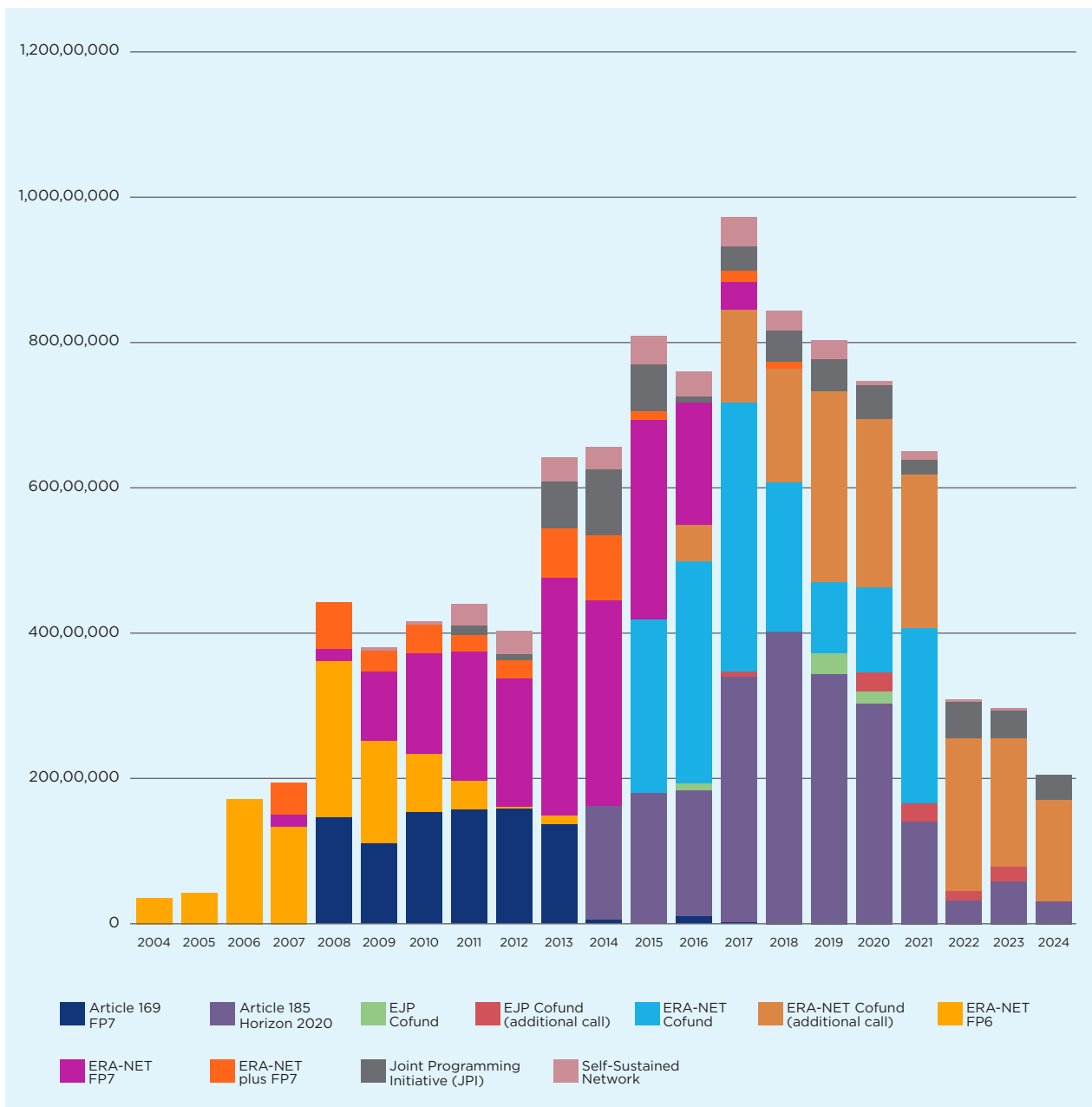


Figure 16: National Joint Call Commitment for all Calls Closed 2004 - 2024, by Partnership Type

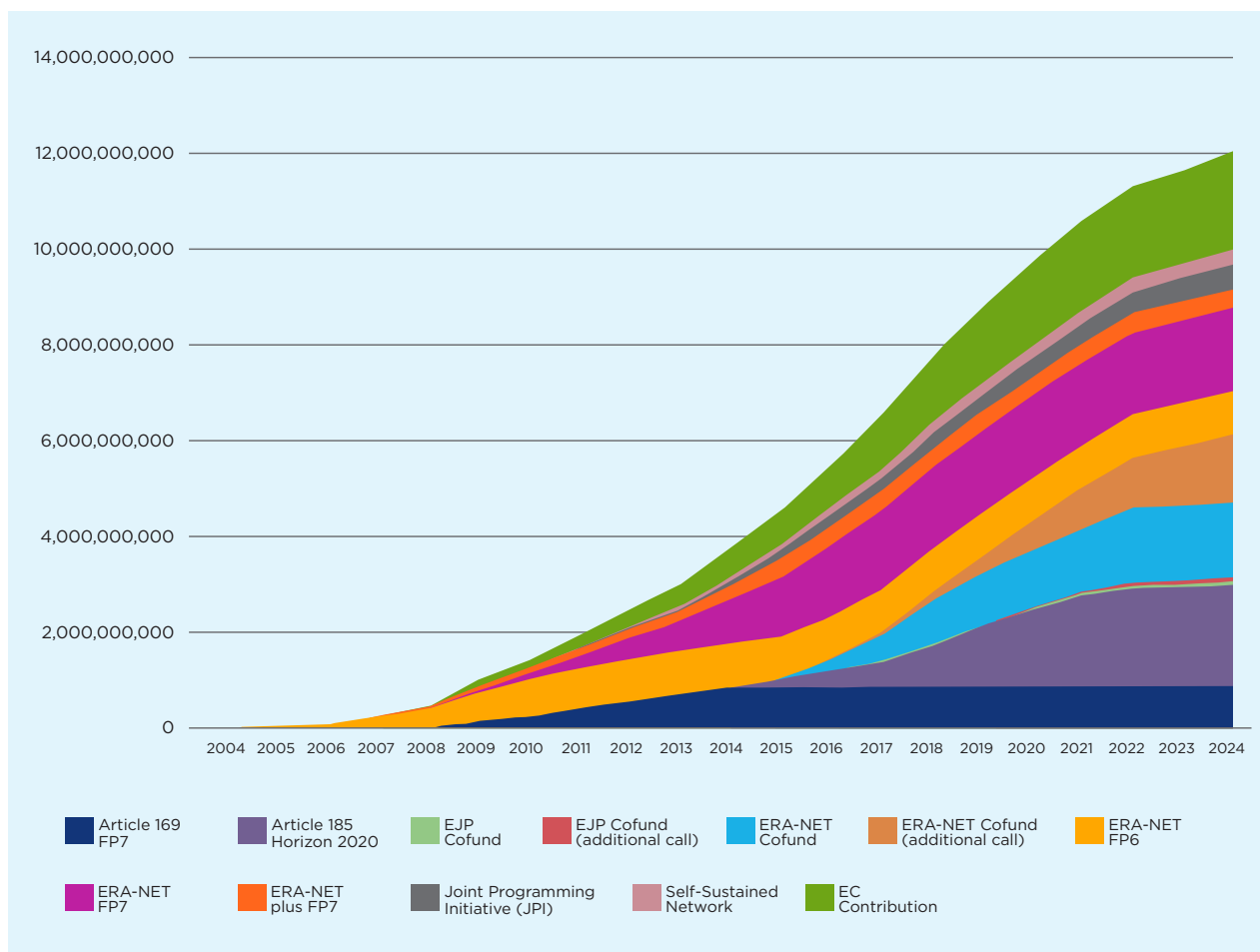


Figure 17: Cumulative Investment in Joint Calls, including EU Contribution, 2004-2024

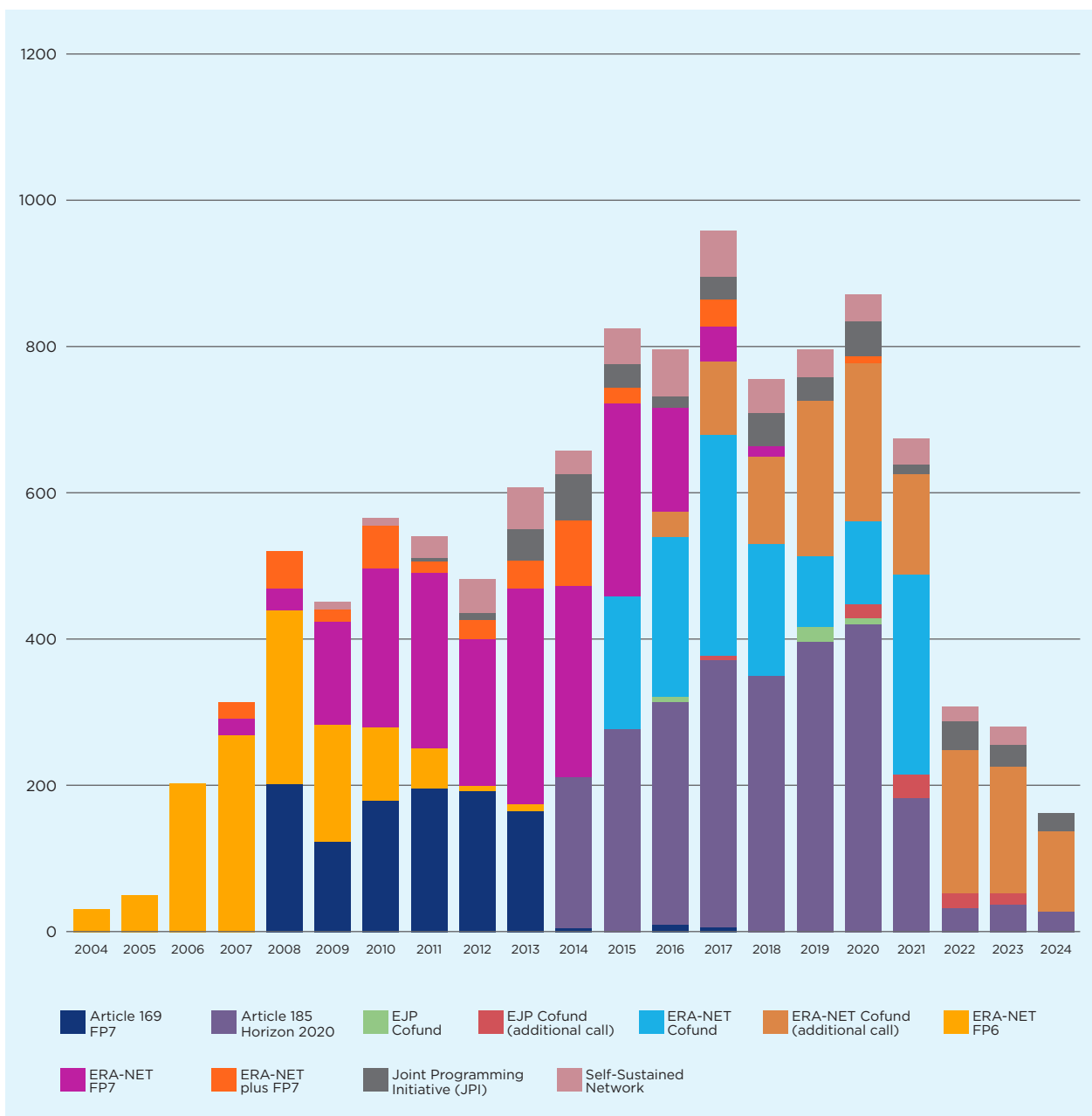
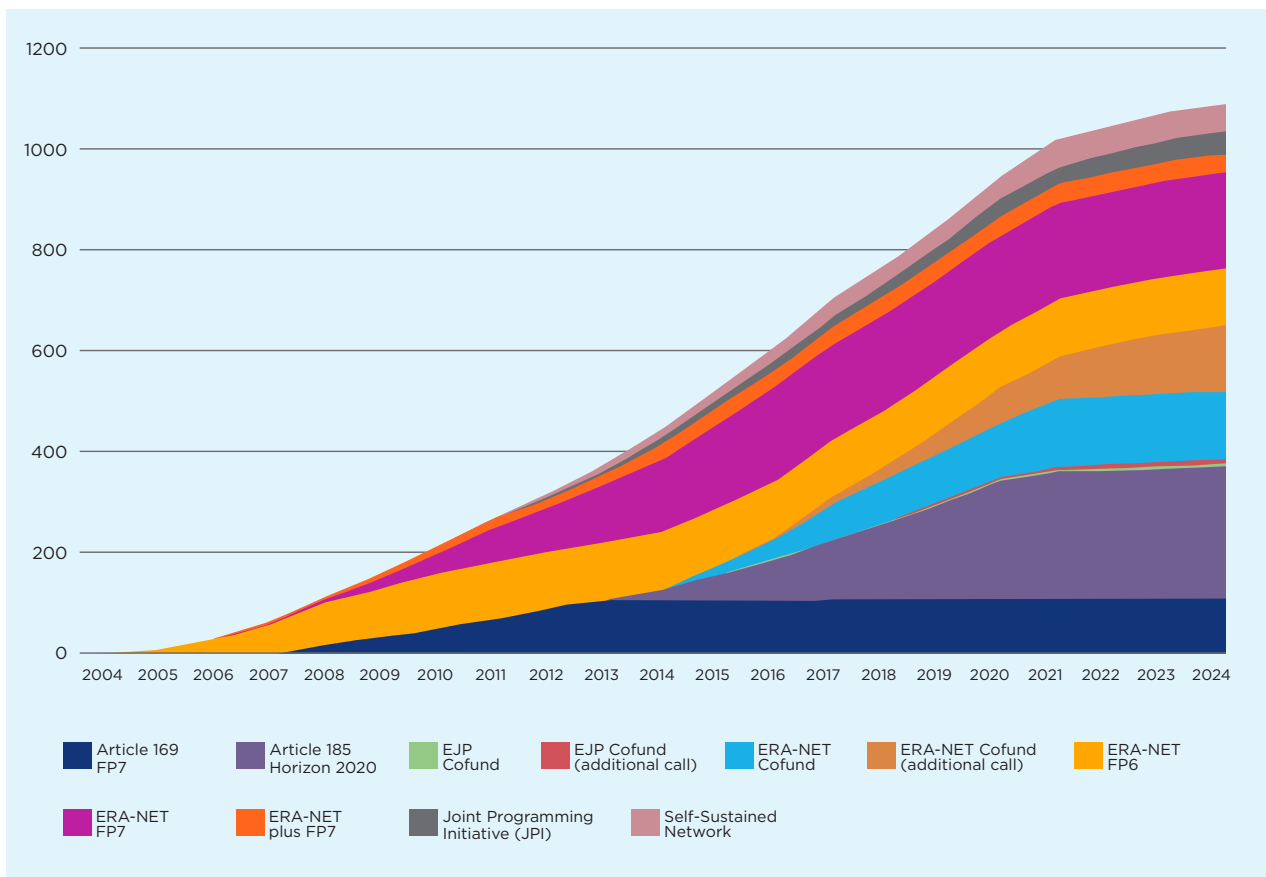


Figure 18: Number of Transnational Projects, by Year and by Partnership Type



**Figure 19: Cumulative Number of Transnational Projects Funded**



**Funded by  
the European Union**