

THE PARTNERSHIP LANDSCAPE IN VIEW OF THE CLUSTERS IN HORIZON EUROPE

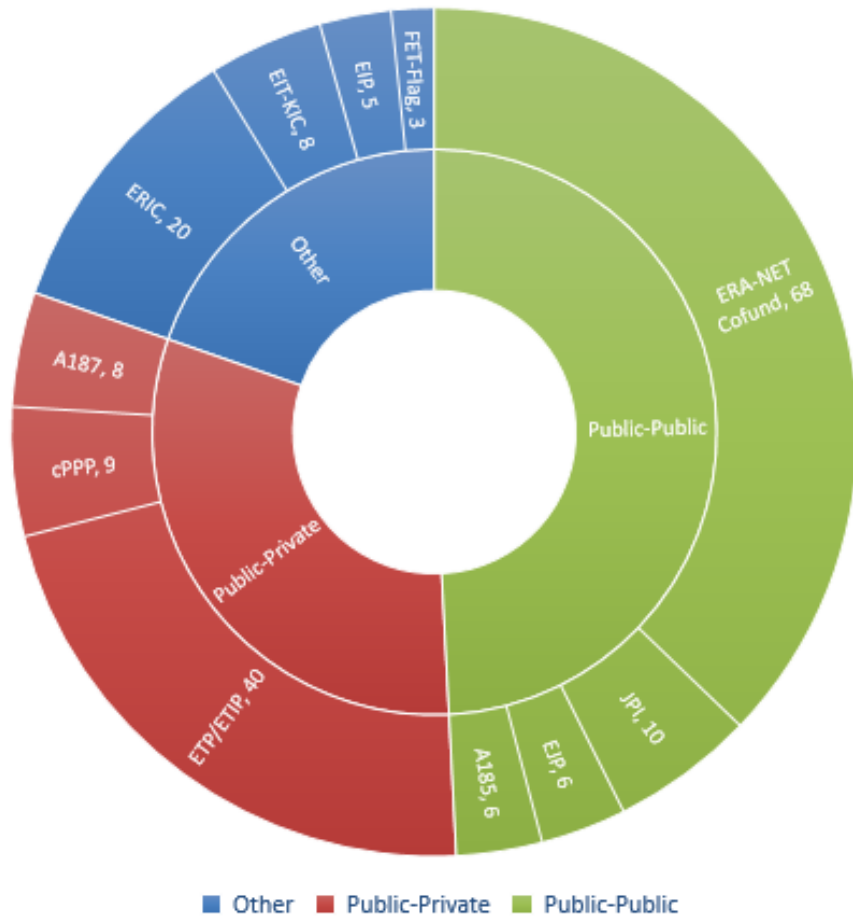
Rationale and Background for the

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- The discussion papers were elaborated by ERA-LEARN to support the coordination and cooperation among networks. They provide...
 - Input to the discussion of **bringing greater coherence** and added value to the partnership landscape
 - Overview on the relevance of the existing partnerships to the proposed Clusters of Horizon Europe
 - Analysis on main type of actors and activities and
 - Interactions between the partnerships
- The discussion papers are seen as a basis for starting discussions among the networks about the potential to adjust and streamline the partnership landscape in view of the challenges addressed by Horizon Europe.
- They are based on:
 - a listing of networks provided by DG RTD which was reviewed and partially modified by ERA-LEARN experts
 - the ERA-LEARN database
 - Desktop research and professional background knowledge of the ERA-LEARN authors of the cluster Reports.

Partnership approaches	Public-public partnerships (P2P)	Public-private partnerships (PPP)	EIT-KICs*	FET Flagships**
Implementation modes	ERA-NET-Cofund, EJP Cofund, Article 185, Joint Programming Initiative (JPI)	Contractual Arrangement (cPPP) Article 187	H2020 Grant agreements for different types of actions Framework Partnership Agreements (FPA)	
Currently active R&I Partnerships (Horizon 2020)	a) ERA-NETs: ~70 b) EJP Cofund: 5 c) Article 185: 6 d) JPIs***: 10	a) JUs: 7 (+HPC) b) cPPPs: 10	a) KICs: 6 (+ 2 until 2020)	a) FET-Flagships: 2 (+Quantum)
Financial contribution from H2020, estimated)	2.500 M€ (3,1% of H2020 budget)	13.450 M€ (17,5% of H2020 budget)	2.400 M€ (3,1% of H2020 budget)	1.000 M€ (1,3% of H2020 budget)
<p>*EIT-KICs: Knowledge and Innovation Communities (KICs) of the European Institute for Innovation and Technology (EIT) **FET-Flagships: Flagships of the Future and Emerging Technologies programme (FET) *** JPIs: Joint Programming Initiatives are no EU level instruments but included here as they receive EU support via ERA-NETs and/or CSAs</p>				

Number and type of currently active partnerships

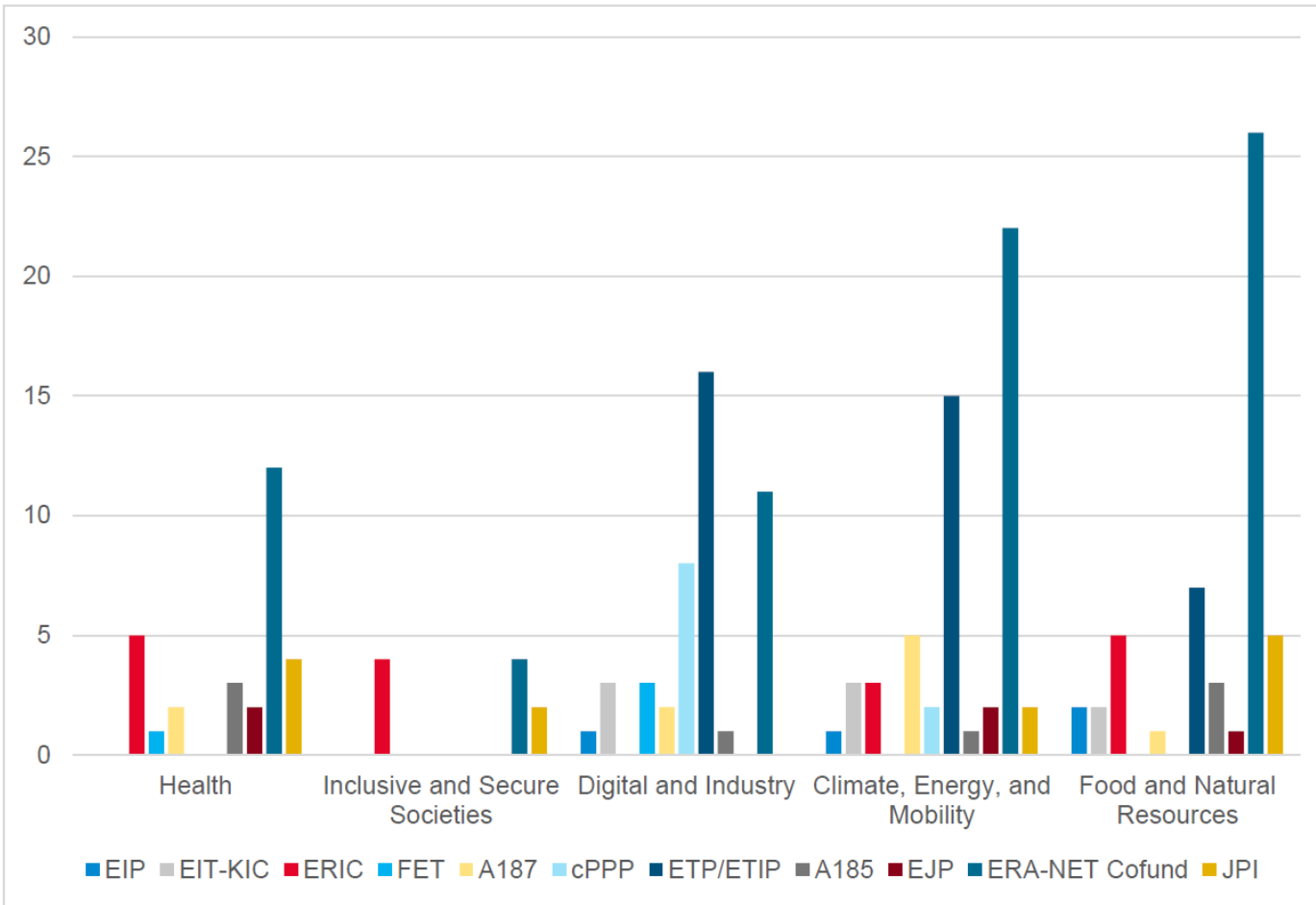


- 183 active partnerships and networks
- 49% of partnerships are Public-Public-Partnerships,
- 31% are Public-Private Partnerships
- 20% are other partnerships.
- ERA-NET Cofunds exhibit the largest number of partnerships included in the analysis followed by ETIP/ETP, and ERICs.
- The eight Art. 187 Joint Undertakings and the cPPPs account by far for the largest share of EU funding provided to all partnership instruments

Global Challenges and Industrial Competitiveness - Clusters in Horizon Europe

Cluster	€ billion	Intervention areas	
Health	€ 7.7	Health throughout the life course Environmental and social health determinants Non-communicable and rare diseases	Infectious diseases Tools, technologies and digital solutions Health care systems
Inclusive and Secure Society	€ 2.8	Democracy Cultural heritage Social and economic transformations	Disaster-resilient societies Protection and Security Cybersecurity
Digital and Industry	€ 15	Manufacturing technologies Key digital technologies Advanced materials Artificial intelligence and robotics	Next generation internet Advanced computing and Big Data Circular industries Low carbon and clean industry Space
Climate, Energy and Mobility	€ 15	Climate science and solutions Energy supply Energy systems and grids Buildings and industrial facilities in energy Energy storage	Communities and cities transition Industrial competitiveness in transport Clean transport and mobility Smart mobility
Food and Natural Resources	€ 10	Environmental observation Biodiversity and natural capital Agriculture, forestry and rural areas	Sea and oceans Food systems Bio-based innovation systems Circular systems

Number and type of fully relevant partnerships per cluster



- Climate, Energy and Mobility and Food and Natural Resources cluster exhibit the highest number and highest diversity of partnerships
- Digital and Industry also exhibits a large variety of partnerships. Except from ERICs, JPIs and EJPs all types of partnerships are fully relevant for this cluster.
- Health cluster shows a higher representation of Public-Public Partnerships but is also populated with institutional Public-Private Partnerships.
- Inclusive and Secure Societies only comprises a very small number of relevant partnerships

Public-Public-Partnerships

- P2P partnerships (in particular ERA-NET Cofunds) usually a coherent group of (national/regional) funding organisations with the same goal of funding
- Topics cover virtually all intervention areas, but the vast majority of P2Ps is limited to one intervention area
- The main activity of ERA-NETs is the implementation of joint calls as well as strategic and operational coordination of funding agencies
- Existing JPIs reach out to the policy level, which is also reflected in governance structures.
- Integration of stakeholders (R&I actors, international bodies etc.) via advisory structures

Public-Private-Partnerships

- Inherent difference between P2P and PPP partnerships or other networks with regard to: actors, goals and activities.
- All form of PPPs exhibit close involvement of private businesses in governance structures
- Activities of PPPs include joint implementation of calls but also programming of R&I activities, contribution to development of technological standards
- EIPs and KICs even broader in scope, including in particular educational activities and creation of start-ups.

Public-Public-Partnerships

- A coherent group of funding organisations sharing the same objectives of funding, contributing to an alignment of national R&I funding activities.
- Implementation of joint calls
- Strategic and operational coordination of agencies and R&I actors.
- JPIs reach out to the policy level, which is also reflected in governance structures.
- Integration of stakeholders via advisory structures

Public-Private-Partnerships

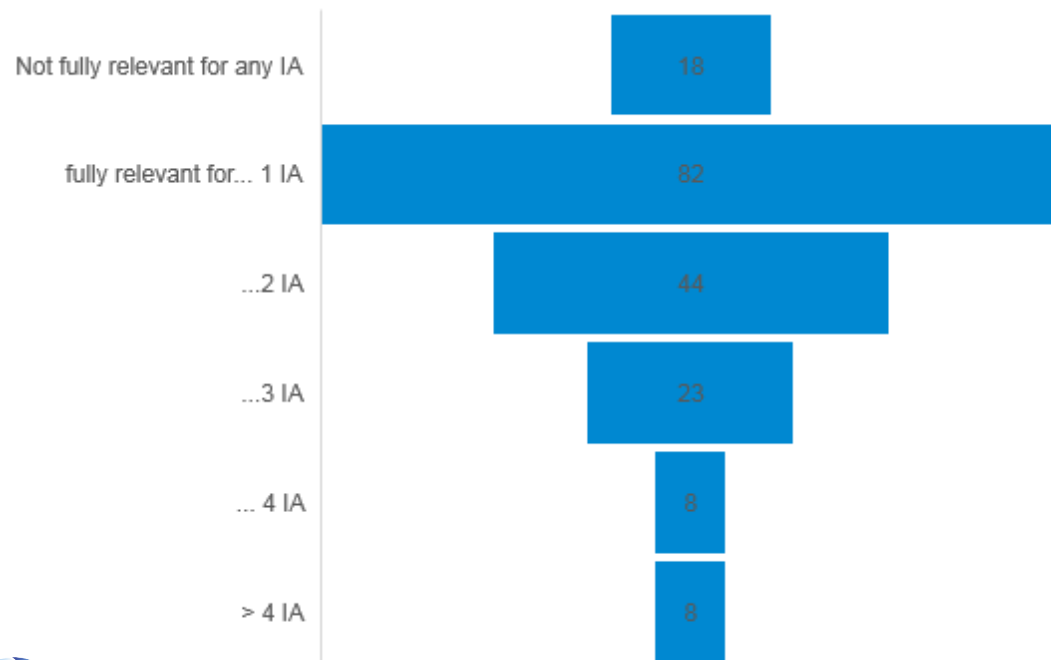
- Development of R&I activities with the aim to strengthen Europe's competitiveness and industrial leadership
- Industry led programming of strategic R&I activities
- Contribution to development of technological standards
- Medium-Term implementation plans
- Close involvement of industry in governance structures, limited influence of EU Member States.

Other partnerships

- Broad scope of activities...
- Future Emerging Technologies
- Activities at the interface between business, higher education and research
- Stakeholder platforms that bring together representatives from industry, public services, academia
- Research infrastructures of viable relevance for European R&I actors

Clusters	Health	Inclusive and Secure Societies	Digital and Industry	Climate, Energy, and Mobility	Food and Natural Resources
Institutionalised Partnership Areas					
Area 1: Faster development and safer use of health innovations	X				
Area 2: Advancing key digital and enabling technologies	X	X	X	X	
Area 3: European leadership in Metrology	X	X	X	X	X
Area 4: EU air traffic, aviation and rail		X		X	
Area 5: Circular bio-based solutions					X
Area 6: Clean hydrogen and sustainable energy storage technologies and less energy-intensive production			X	X	
Area 7: Future mobility demands of people and goods			X	X	
Area 8: Innovative and R&D intensive small and medium-sized enterprises					

Virtually every intervention area of Horizon Europe is populated by a large number of different types of partnerships that are operating in similar fields of concern.



- How can synergies among the different types of partnerships be explored and established?
- How can coordination efforts between partnerships and administration efforts across research funding organisations be designed as efficiently as possible?
- How can fair and easy access of research and innovation communities be granted to this wealth of different types of partnerships?

Within the world of Public-Public Partnerships, a number of common means of interaction have emerged.

- ERA-NET Cofunds have emerged as implementation structures of JPIs.
- Certain ERA-NET Cofunds form distinct thematic clusters.
- Informal collaborations are common in order avoid duplication of efforts for setting up call topics.

- Is there a scope for merging of existing partnerships into bigger entities?
- Are there any means to design the joint activities of different partnerships more effectively?
- How can the potential administrative burden be minimised and longer-term funding agreements between national and EU players be achieved?

Connections between public-public and public-private and other partnerships are limited, despite of a cross-cutting relevance.

- Connections between the P2P and non-P2P world are limited even in areas that are represented in both communities
- The level of connectivity between Art. 187 initiatives and cPPPs with Public-Public Partnerships seems to be low.
- The Knowledge and Innovation Communities of the EIT-KIC seem to be fairly disconnected from various relevant partnerships,

- To what extent does the scope of activities performed by these partnerships require collaboration among the various types of partnerships?
- What could a (stronger) cooperation between different kinds of partnerships look like?
- What are critical factors for such a cooperation and consequences for e.g. governance, instruments, target groups?
- Where is the highest potential for synergies across partnerships?