

Partnership Stakeholder Forum 2023

Parallel session A1

Parallel session A1: Synergies between partnerships and missions

Date: December 5th, 2023, 16.00-17.15 CET

Venue: BluePoint Brussels, Bd A. Reyers Ln 80, 1030 Brussels, Newton B/C

Background

Both Missions and Partnerships were established to provide clear and strategic directionality in funding for R&I. They set clear destinations and prepare the way towards them by concentrating R&I funding, related funding streams and other instruments (policy, regulation) on key strategic challenges that matter to EU citizens.

At the previous event (Partnership Stakeholder Forum Nov. 2022) the session “Collaboration with EU Missions“ highlighted the importance of identifying and using synergies between the European Partnerships and the EU Missions, to create a win-win scenario for maximising the impact of the two instruments.

While we can easily identify possible synergies, the challenge lies in how to operationalise and exploit these synergy effects in the best way. Last year’s session highlighted potential activities that could strengthen synergies such as joint calls, linking projects thematically together, exchanging of results and stimulating networking among the involved actors, contributing knowledge, by feeding its results into capacity building, experimentation and so on.

The Prague Declaration on Synergies (2022) shows the importance of identifying and utilising synergies in several ways as well as the need to remove persisting barriers and facilitate better synergies. Synergies are also featured as a cross-cutting theme in the Biennial Monitoring Report (BMR) 2022 on partnerships in Horizon Europe, bringing to light diverse examples of synergy creation.

Based on the previous work, this parallel session will focus on synergies between partnerships themselves and with missions.

Goals/ Output

This session will

- give an overview of potential synergies
- showcase good practices
- facilitate the exchange of experiences
- discuss on how to proceed

Moderator: Tom Espen Møller, Research Council of Norway

Agenda

16:00 Introduction/ Setting the scene, *Tom-Espen Møller, RCN*

Speakers identify good practice cases from the thematic area environment, climate and health

- *Luis Vivas Alegre, EC, DG AGRI,*
- *Margit Noll, FFG, DUT*
- *Kathrine Angell-Hansen, RCN, Sustainable Blue Economy Partnership*
- *Petra Manderscheid, JPI Climate*
- *Andrea Gentili EC, DG RTD*

Open Dialog

17:00 Wrap-up

End: 17:15

Partnership Stakeholder Forum 2023

Parallel session A2

Parallel session A2: Input for HE interim evaluation: experiences, achievements and needs of the European partnerships

Date: December 5th, 2023, 16.00-17.15 CET

Venue: BluePoint Brussels, Bd A. Reyers Ln 80, 1030 Brussels, Room Vesalius

Background

The interim evaluation covers the first results of Horizon Europe's R&I actions funded by the EU in 2021-2023, as required under Regulation 2021/695 (Article 52). It provides a baseline for understanding the key achievements to date and will help inform the design of future EU R&I instruments. The evaluation covers five thematic areas: excellence in science, green transition, digital and industrial transition, resilient Europe, and innovative Europe.

Goals/ Output

- Collect feedback from stakeholders on their experiences with this evaluation, provide space for discussion and facilitate mutual learning among participants.
- Identify areas where demand for action lies, discuss opportunities and risks partnerships foresee for the next few years in a rapidly evolving context.

Moderator: Roberto Volpe, RTD/G2, European Commission.

Panel speakers

- Annika Szabo Portela, Managing Director for EIT Health Scandinavia and ad interim Chief Partnership Management Officer at EIT Health
- Wouter IJzermans, Executive Director for BEPA, the private-side association representing the battery research and industry communities in the Batt4EU
- Ariane Blum, CEO Water4All, French national research agency (ANR)
- Nicoló Giacomuzzi-Moore, Executive Director of CBE JU

Agenda

16:00 Welcome by the moderator and presentation of the agenda and speakers.

16:05 Presentation, followed by a short Q&A.

- *Horizon Europe interim evaluation: approach, process, and next steps, Milena Isakovic-Suni (RTD/G2).*

16:15 Panel and audience discussion structured around thematic blocks, starting with an introduction by the moderator, a reflection by the panel and an invitation to the audience to join.

- *Experiences of the evaluation process.* What worked well during the interim evaluation, and what could be improved in future evaluations?
- *Demand for action.* What gaps and challenges do partnerships face today considering the changes within Horizon Europe and broader developments?
- *Navigating the future.* What are the risks and opportunities for the next few years towards achieving the partnerships' desired results?

17:00 Final discussion and reflection across topics.

Partnership Stakeholder Forum 2023

Parallel session A3

Parallel session A3: Beyond HE funding: additionality and directionality of European Partnerships

Date: December 5th, 2023, 16.00-17.15 CET

Venue: BluePoint Brussels, Bd A. Reyers Ln 80, 1030 Brussels, Room Vesalius

Background

European Partnerships are established only if there is evidence that they support achieving EU policy objectives more effectively than other Horizon Europe actions. They are all based on agreed objectives and a long-term vision, underpinned by Strategic Research and Innovation Agendas (SRIAs) that are shared and committed to by all partners in the partnership.

An important added value of European Partnerships derives from the additional private and/or public R&I investments in EU priorities (additionality) that can be translated into a leverage effect resulting from Union intervention. The alignment of these investments and contributions towards common objectives (directionality) and the achievement of impacts that cannot be created by other Horizon Europe or national actions alone is the main justification for using a partnership approach. The combined contributions (input) will mobilise additional investments (output) in support of the transitions and create long-term positive impacts on employment, the environment and society.

Commission definitions on leverage effect and long-term financial commitment

Long-term financial commitment: The long-term financial commitment of participating countries and/or industry and other stakeholders is a precondition for considering the establishment of a European Partnership. The commitment should be clear from the outset and ensured during the lifetime of the partnership, including beyond Union support, where appropriate. The endured commitment over the lifecycle of the European Partnership, including adequate human resources, is a core indicator for ensuring its relevance. The potential combination of cash and in-kind contributions has to be defined individually per partnership and requires appropriate and transparent calculation methodologies across the different partnership approaches.

Leverage: The leverage effect of R&I partnerships has both a quantitative and qualitative dimension. The quantitative dimension describes the additional investments triggered by the partnerships and the corresponding leverage effect the EU co-funding creates for exploiting or scaling-up results (financial additionality). The quantitative leverage effect needs to be reported on the basis of a harmonised calculation methodology. The qualitative dimension describes the wider impacts according to its intervention logic.

Goals/ Output

This workshop

- gives an overview on the background of the Partnerships' criteria on additionality and directionality
- provides an overview on analyses on directionality and additionality
- provides examples and different dimensions of directionality and additionality reached in different European Partnerships
- facilitates the exchange of experiences with stakeholders from all Partnership formats
- discusses challenges, chances and limits of European Partnerships with regard to directionality and additionality also in the light of Partnerships in FP10

Moderator: Pierre Michel, European Commission

Agenda

16:00 Introduction, *Pierre Michel, European Commission*

Directionality and Additionality: Outcomes of the Biennial Monitoring Report

- o *Úlle Napa, member of the BMR expert group*

16:15 Additionality/ directionality and national strategies

- o *Jakob Just Madsen, MS representative, DK*

16:25 Dimensions of additionality/ directionality in European Partnerships

- o *Rainer Sodtke, Biodiversa+*
- o *Jesus Contreras, EIT Digital Chief Operations and Financial Officer*

Added value of European Partnership funding compared to other European instruments and national programmes

- o *Prof. Klaus Pantel, Director of the Institute of Tumor Biology, University Medical Center Hamburg, Eppendorf, ERC Advanced and PoC Grantee*

17:00 Main conclusions and discussion on future processes and necessities

End: 17:15

Partnership Stakeholder Forum 2023

Parallel session A4

Parallel session A4: Developing a coherent partnership portfolio – work of the Expert Group supporting the EC in the Strategic Coordination Process for Partnerships

Date: December 5th, 2023, 16:00-17:15 CET

Venue: BluePoint Brussels, Bd A. Reyers Ln 80, 1030 Brussel, Room Newton A

Background

In the context of the second strategic planning phase of Horizon Europe for 2025-2027 that is planned to be adopted in 2024. The Commission and national and regional governments make decisions about launching and participating in European Partnerships based in political priorities and the Horizon Europe legal base. However, there is currently no established methodology allowing objective and systematic analysis and assessment of candidate partnership proposals in this context.

The Expert Group for support of the Strategic Coordination process for Partnerships¹ was entrusted with the task of developing a methodology that will allow the creation of evidence-based decision support for the development of the portfolio of European Partnerships. The methodology complements the current bottom-up selection process with a strategic view of the portfolio building, considering the coherence of the portfolio as a whole and as regards emerging R&I priorities.

The methodology developed by the expert group includes specific steps, and a set of criteria addressing the legal basis as well as the partnership-internal portfolio management requirements, as well as methods and tools on how these criteria can be assessed. The parameters on which the methodology has been built, including specific dimensions and weighting of the criteria remain open to allow any adjustments (according to the current and future needs and requirements of the eventual decision-makers) as well as further developments. The expert group piloted parts of the methodology on the portfolio of institutionalised partnerships. The suggested methodology was designed to provide an additional strategic overview in the light of policy priorities and societal challenges, and to assess the portfolio as a whole. It can help filter the results of the current selection process and ensure that the final list is constituted by the most relevant candidates.

Goals/ Output

Besides the experts' work, the resulting methodology was based on consultation with relevant EC officials as well as the partnership representatives and was briefly presented in one of the PKH meetings. Yet, it would benefit from a structured discussion in the framework of the Partnership Stakeholder Forum. The aim would be to:

¹ <https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&do=groupDetail.groupDetail&groupID=3738&news=1>

- Familiarize the partnership community (including also the EC and Member States/Associated Countries) with the suggested methodology
- Explore the need for specifications/adjustments to account for the features of the partnership approach and thematic orientations and identify any gaps or deficiencies in the suggested methodology
- Examine the applicability and integration of the methodology in the overall selection process existing today.

Moderator: Marion Jamard, European Commission

Agenda

16:00 Introduction, *Marion Jamard, European Commission*

16:05 Developing a coherent partnership portfolio – work of the Expert Group supporting the EC in the Strategic Coordination Process for Partnerships

- Daria Julkowska, Chair of the Expert Group on support of the strategic coordinating process for partnerships (BMR)
- Michael Dooms member of the Expert Group

16:25 Panel comments by followed

- Alexander Grablowitz, German Ministry of Education and Research, Head of Unit “Research and Innovation in the EU”, Co-Chair PKH
- Erik Canton, European Commission
- Magali Poinot, Innovative Health Initiative

16:40 Panel and open discussion supported also by Sli.do questions/results.

17:10 Rapping up of the discussion and end of session