Building a coherent and strategic portfolio of European Partnerships

Independent Expert group on Directional Initiatives

3 December 2025, Brussels

European Commission

Disclaimer

This presentation by the Expert Group does not necessarily reflect the views of the Commission or indicate its commitment on or encouragement towards a particular course of action.

> If Europe cannot become more productive, we will be forced to choose. We will not be able to become, at once, a leader in new technologies, a beacon of climate responsibility and an independent player on the world stage.

— Mario Draghi

Why transformation is essential – and why we must act together

The EU Faces Unprecedented Challenges:

- Climate Crisis & Energy Transition
- Digital Disruption
- Geopolitical Instability
- Demographic Shifts
- Economic Competitiveness

Transformation Is Non-Negotiable:

- Evolutionary change is no longer enough
- Global dynamics demand agility and bold action
- Or we risk losing relevance and resilience

Collaboration Is the Key

Your Role Matters:

- Engage actively – shape the future and be the source of change
- Adapt partnerships to new realities – relevance over legacy
- See change as opportunity

➢ **Together, we can turn disruption into progress.**

Strategic Portfolio of Directional Initiatives

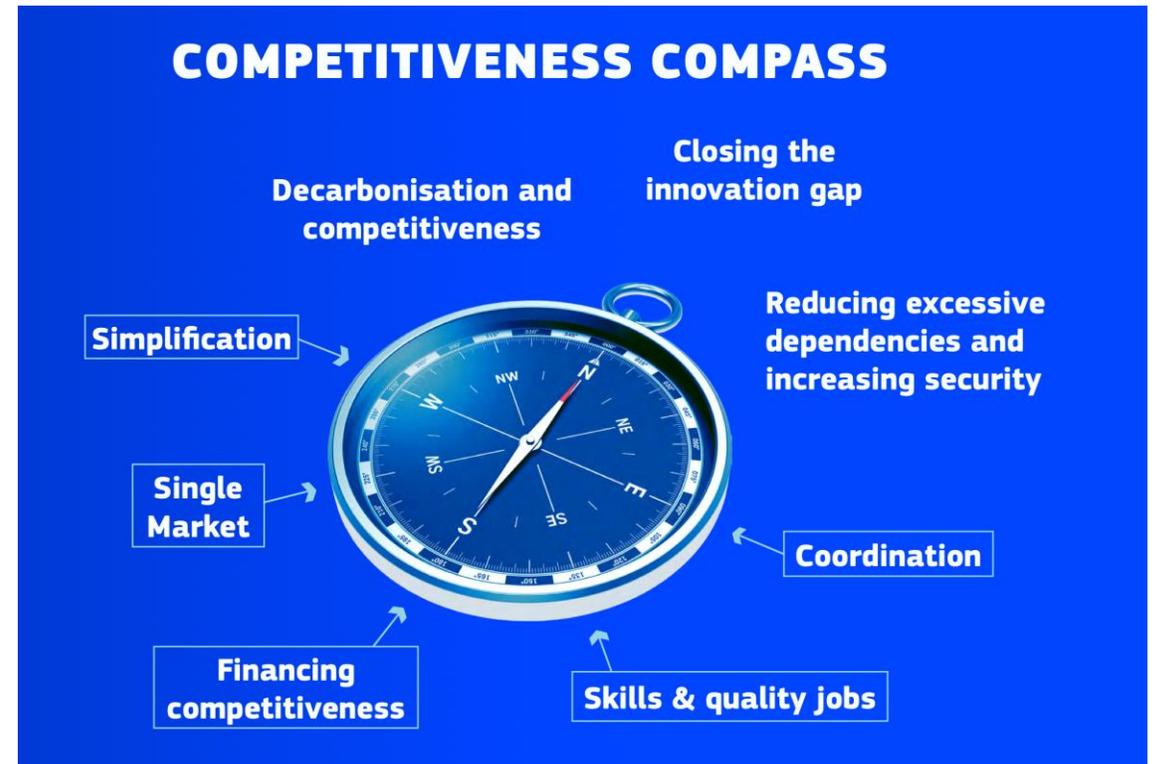Sets **clear and measurable objectives**;

Fosters **strategic alignment** with EU policy objectives and long-term strategic priorities;

Ensures long-term commitment and **sustained funding and governance structures**;

Mobilizes significant resources aiming at **creating critical mass**;

Fosters **cooperation** between a broad range of actors, disciplines and sectors and **stronger engagement of EU industry**;

Enables **better coordination and more effective implementation**

COMPETITIVENESS COMPASS

Decarbonisation and competitiveness

Closing the innovation gap

Simplification

Reducing excessive dependencies and increasing security

Single Market

Coordination

Financing competitiveness

Skills & quality jobs

Current overview of European Partnerships

PILLAR II - Global challenges & European industrial competitiveness

PILLAR III - Innovative Europe

CLUSTER 1: Health

- Innovative Health Initiative
- Global Health Partnership
- Transformation of health systems
- Chemicals risk assessment
- ERA for Health
- Rare diseases
- One-Health Anti Microbial Resistance
- Personalised Medicine
- Pandemic Preparedness*
- Brain Health

CLUSTER 2: Culture, Creativity, Inclusive Societies

- Resilient Cultural Heritage
- Social Transformations and Resilience

CLUSTER 4: Digital, Industry & Space

- Chips (formerly KDT)
- Smart Networks & Services
- High Performance Computing
- European Metrology (Art. 185)
- AI-Data-Robotics
- Photonics
- Made in Europe
- Clean steel – low-carbon steelmaking
- Processes4Planet
- Global competitive space systems
- Innovative Materials for EU (I AM for EU)
- Virtual Worlds
- Textiles of the Future
- Raw Materials for the Green and Digital Transition

CLUSTER 5: Climate, Energy & Mobility

- Clean Hydrogen
- Clean Aviation
- Single European Sky ATM Research 3
- Europe's Rail
- Connected and Automated Mobility (CCAM)
- Batt4EU
- Zero-emission waterborne transport
- Zero-emission road transport
- Built4People
- Solar Photovoltaics
- Clean Energy Transition
- Driving Urban Transitions

CLUSTER 6: Food, Bio-economy, Agriculture, Env…

- Circular Bio-based Europe
- R&I in the Mediterranean Area (PRIMA, Art. 185)**
- Biodiversa+
- Climate Neutral, Sustainable & Productive Blue Economy
- Water4All
- Animal Health & Welfare
- Accelerating Farming Systems Transitions
- Agriculture of Data*
- Safe & Sustainable Food System
- Forests and Forestry for a sustainable Future

EUROPEAN INNOVATION ECOSYSTEMS

- Innovative SMEs

EIT

- InnoEnergy
- Climate
- Digital
- Food
- Health
- Raw Materials
- Manufacturing
- Urban Mobility
- Cultural and Creative Industries
- Water, Marine and Maritime Sectors and Ecosystem*

CROSS-PILLARS I AND II

- European Open Science Cloud

Legend

- 🟩 Institutionalised Partnerships (Art. 185/7)
- 🟧 Institutionalised partnerships / EIT KICs
- 🟦 Co-programmed
- 🟨 Co-funded
- ▢ Horizon Europe strategic plan 2025-2027

Purpose of Expert Group

Towards a **more streamlined, coherent and integrated partnership landscape**:

a) Develop a **methodology to identify current and future thematic areas** in which current challenges require a directional initiative to address them.

b) Develop **a methodology to define the most optimal configuration of the portfolio** of European Partnerships.

c) Develop a **portfolio selection and configuration process** building on the above methodologies, that integrates strategic direction from policy priorities with input and commitment from stakeholders.

Introduction of the Expert Group

**Emily Wise
(Chair)**

**Amber Geurts
(Rapporteur)**

Michael Dooms

Krzysztof Gulda

Anja Haslinger

- Strategic policy planning, portfolio management, system thinking, foresight, and economic and financial analysis of R&I investments

- Research and innovation policy, and the design, implementation, or governance of large-scale directional initiatives

- Priority-setting, implementation, and evaluation of the EU Framework Programmes, including European Partnerships and EU Missions

Vision and premises

European Partnerships as **instrument supporting EU competitiveness**:

I. The EU wants **to position** itself more confidently and strengthen competitiveness.

II. Resources are **to be pooled and targeted** where individual member states cannot do so on their own.

III. Stronger **cooperation with industry** to accelerate innovation and market launch and scaling.

IV. **Strategic robustness** is to be ensured by establishing long-term, dynamic partnerships and sustainable structures.

V. Maintain **flexibility and agility** in portfolio design and development over time

Our approach: scenario building

Scenario 1: Organic Reconfiguration

Description

The **Organic Reconfiguration** scenario represents an **evolutionary,** bottom-up approach to portfolio change. It **builds on existing structures,** allowing partnerships to adapt organically over time.

The scenario relies on voluntary changes to structures and strategies to fulfil partnership criteria and align with broad policy windows.

Process - illustrative
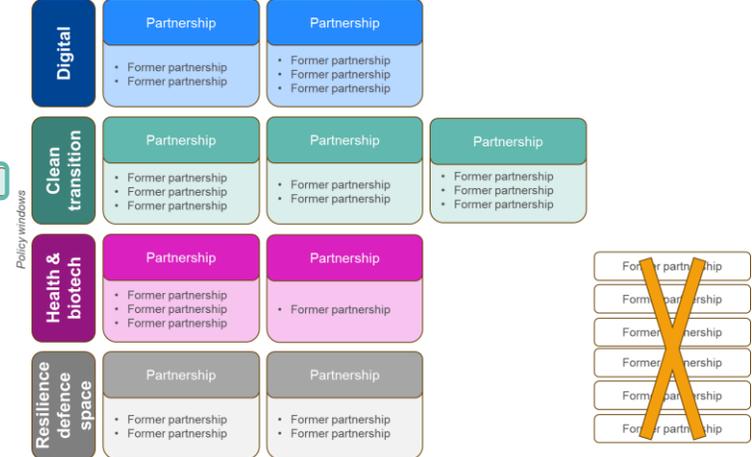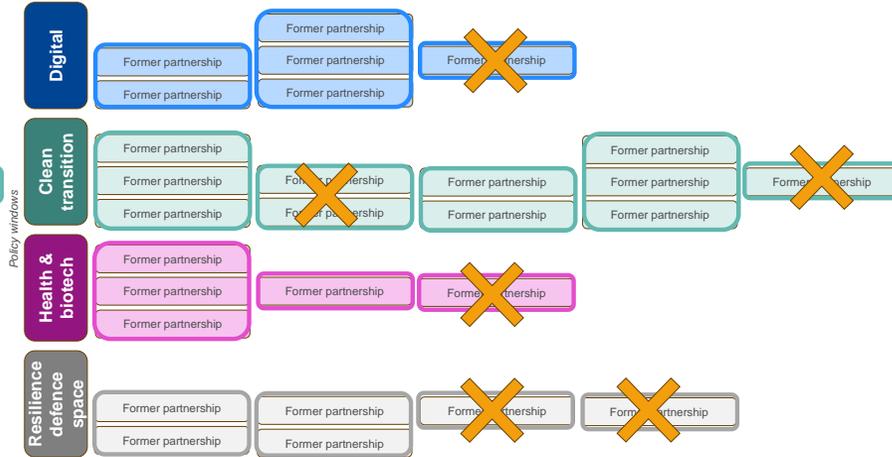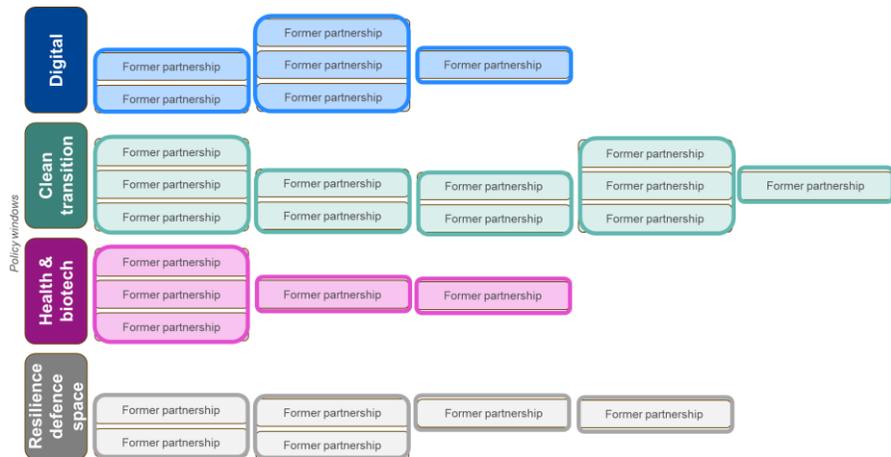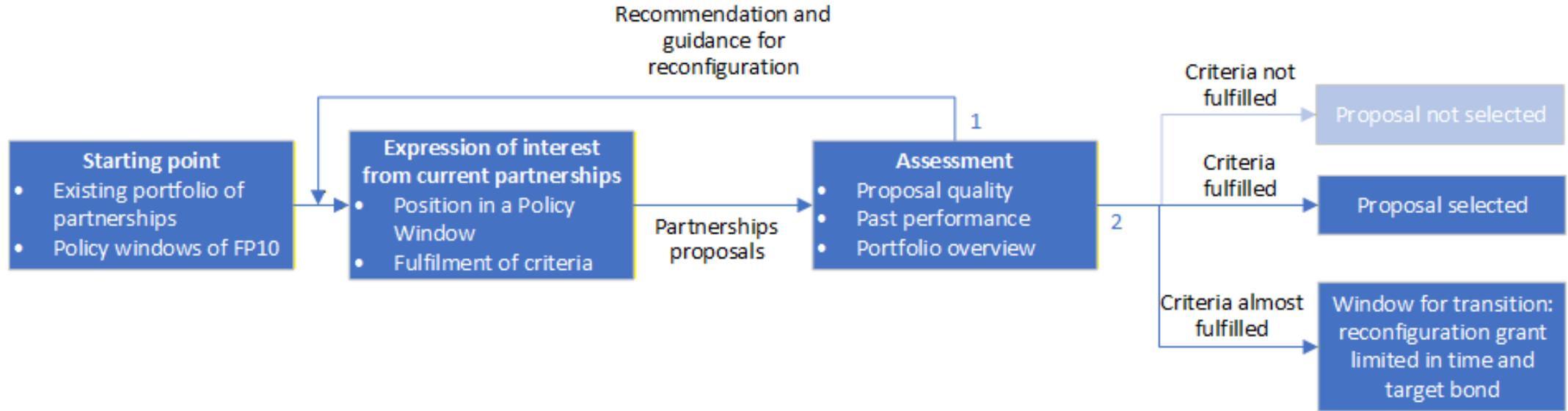
Scenario 1: Pros & Cons

PROs

- Minimal disruption

- Strong bottom-up dynamic, empowering self-organization around policy priorities

- Facilitates organic change management and adaptation within existing communities

- High transparency through use of criteria/thresholds

CONs

- Without clear thematic criteria, risk of fragmented, heterogeneous portfolio

- Lack of steering mechanisms could hinder programme's ability to respond to new challenges and opportunities during the transformation process and risks path dependency/loss of momentum

- Reliance on general review criteria to ensure strategic alignment; portfolio may not be as strategic as other scenarios

- Longer timeframe towards desired change

Scenario 2: Phased Transition

Description

Phased Transition is a **hybrid** approach that combines **bottom-up engagement with top-down direction.**

It introduces clearer policy frames and criteria to guide mergers and streamlining, while inviting bottom-up expression of interest for thematics and facilitated configuration of the portfolio.

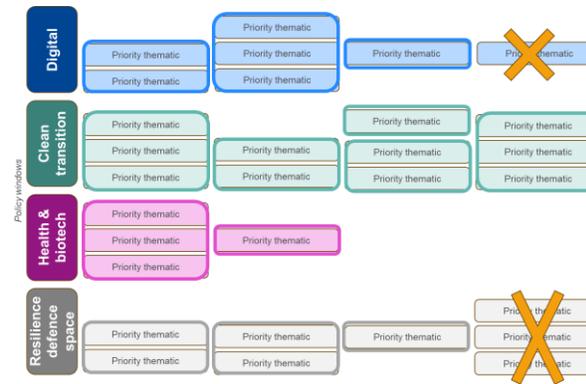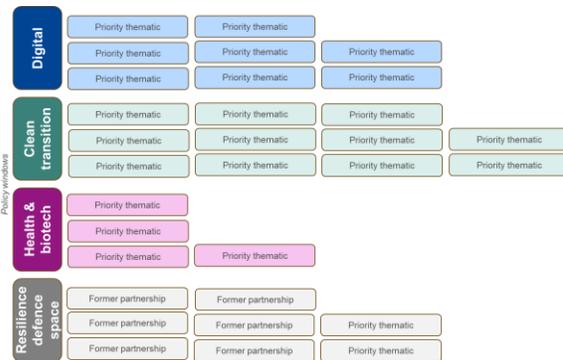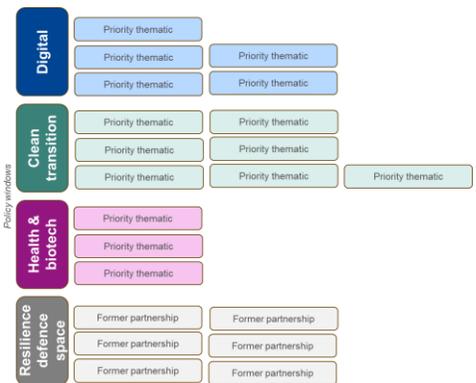# Process - illustrative
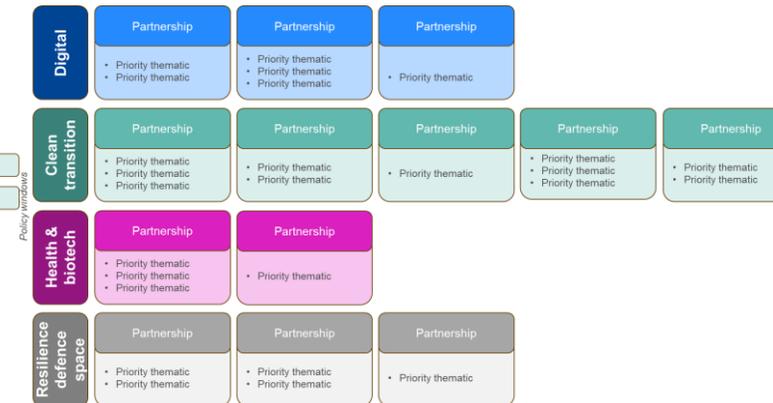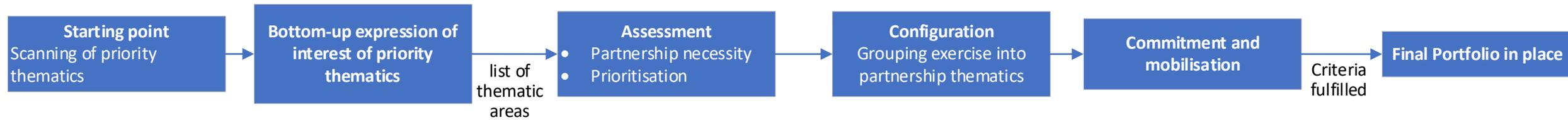
Scenario 2: Pros & Cons

PROs

- More focused alignment with EU policy priorities

- Balances stakeholder engagement with strategic direction

- Clearer guidance on partnership formation

- Flexibility for different types of partnerships (broad and narrow, tech or challenge oriented)

CONs

- Increased push for mergers and adaptations (stronger pressure on existing partnerships)

- More strict policy frames and specific criteria for partnership formation

- Risk of uneven progress and potential fragmentation of the portfolio

- Resource intensive process in terms of governance and implementation

Scenario 3: Comprehensive Transformation

Description

Comprehensive Transformation is a **revolutionary, top-down scenario**.

It starts with a blank slate, defining a more concrete end state (e.g. max of 15 prioritised thematic areas, each dynamically led by broad partnerships) and requiring all existing partnerships to reapply, merge or exit.

The scenario builds on a thorough process of scanning to identify thematic areas (and sub-themes) and a highly managed portfolio configuration process where adjusted governance structures may be needed.

Process - illustrative

Shortlist to further develop strategy

Starting point
Scanning of priority thematics fulfilling a set of criteria

list of broad partnership thematic areas

Call for interest to platform managers and strategies

Assessment
- Thematic focus areas
- How and with whom
- Evidence of management capacity

1

2

Platform and strategy selected

Commitment and mobilisation
- Integration under a same vision
- Grant to concretise strategy

Assessment
- Resources level
- Members & governance
- Targets and related monitoring processes

Criteria fulfilled

Final Portfolio in place

15 European Partnerships

Policy windows

Chapters

Digital	Partnership	Partnership	Partnership	Partnership
	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter

Clean transition	Partnership	Partnership	Partnership	Partnership
	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter

Health & biotech	Partnership	Partnership	Partnership
	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter

Resilience defence space	Partnership	Partnership	Partnership	Partnership
	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter	• Chapter • Chapter • Chapter

Scenario 3: Pros & Cons

PROs

- Directed process of transformation with a clear objective/end state

- Direct alignment of partnerships with EU policy priorities

- Coherent portfolio configuration, achieved rapidly

- Limited/more easily manageable set of partnerships

CONs

- Disruptive shift, risking exclusion of some stakeholders

- Initially resource intensive for identification of thematics and selection of partnerships

- High requirements for partnership leadership/governance and dynamic coordination of broad areas and stakeholder groups

Q&A

- What are most important characteristics of a portfolio configuration/change process?

- What, according to you, is the most important premise of the portfolio of partnerships?

- What, according to you, should be the main goal to achieve in the portfolio configuration/change process?

Thank you

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