

Orientations
towards the first Strategic Plan
implementing the research and innovation
framework programme Horizon Europe

CO-DESIGN
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READING GUIDE

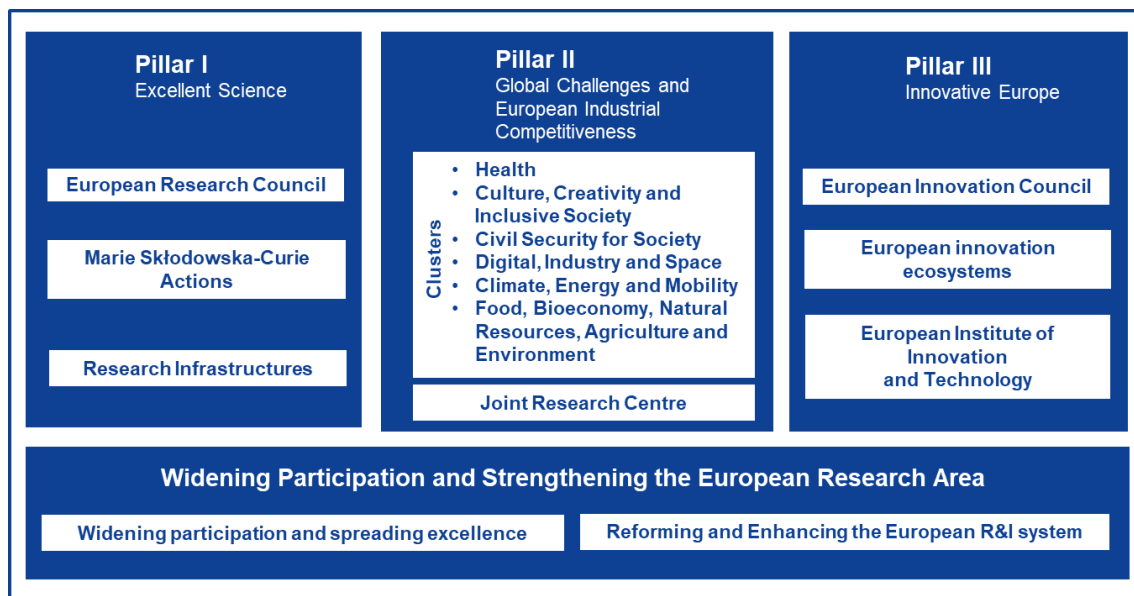
The purpose of this document is to inform and stimulate a co-design process that will prepare the **first Strategic Plan for Horizon Europe** – the European Union Framework Programme for Research and Innovation 2021 – 2027 (Horizon Europe).

Horizon Europe will be based on two legal acts: one laying down its structure, rules for participation and dissemination, the other containing the Specific Programme that sets out thematic clusters and the broad lines of action for future research and innovation activities.

In April 2019 the European Parliament and the Council reached a **political agreement** on the two legal acts. According to this agreement, Horizon Europe will be structured in three pillars, supported by activities aimed at widening participation and strengthening the European Research Area (see figure 1):

- Pillar I, **Excellent Science** will reinforce EU scientific leadership through the European Research Council (ERC), Marie Skłodowska-Curie Actions and Research Infrastructures.
- Pillar II, **Global Challenges and European Industrial Competitiveness** will take forward the societal challenges and enabling and industrial technologies to better address EU and global policy priorities and accelerate industrial transformation. Pillar II includes six broad thematic “clusters” of activities.
- Pillar III, **Innovative Europe**, focuses on stimulating, nurturing and deploying disruptive and market-creating innovations, and on enhancing European ecosystems conducive to innovation, including through the new European Innovation Council.

Preliminary Horizon Europe Structure



In line with the political agreement between the Council and the Parliament, the preparation of the Strategic Plan, referred to as the **strategic planning process**, will focus in particular on the pillar ‘Global Challenges and European Industrial Competitiveness’ and its six thematic clusters, while also including relevant activities in the other two pillars and the part ‘Widening Participation and Strengthening the European Research Area’.

The first Horizon Europe Strategic Plan will facilitate the implementation of Horizon Europe by acting as a bridge between the Horizon Europe Specific Programme and the future, multi-annual work programmes that will contain the calls and topics to which interested parties can apply. The Strategic Plan will set out key **strategic orientations for the support to research and innovation**, including a description of targeted impacts, cross-cluster issues and intervention areas covered. It will also identify missions and European Partnerships. As such, the plan will not repeat the rationale of the Horizon Europe Specific Programme, nor the intervention logic that led to the component parts of the programme. Rather, taking the Specific Programme as a starting point, it will identify the major policy drivers, the strategic policy priorities, and the targeted impacts to be achieved, focussing on those elements within the Specific Programme that should be supported from 2021 to 2024. The projects supported in the first four years of Horizon Europe will normally be completed after 2025. As it takes time to transform new ideas to concrete actions, the planning process focuses on identifying the impacts targeted with European research and innovation from 2030 onwards.

The strategic planning process will also include close coordination and synergy with the planning of the Knowledge and Innovation Communities (KICs) of the European Institute of Innovation and Technology (EIT) and consider the balance of research and innovation activities, so to promote technological, non-technological and social innovation as appropriate in view of the targeted impact.

At a later stage, the strategic planning process will address **synergies** between Horizon Europe and other Union programmes thus becoming a point of reference for research and innovation in all related programmes across the EU budget and non-funding instruments. It will also provide the framework for linking the direct actions of the **Joint Research Centre** and other actions supported under Horizon Europe, including the use of results and data for support to policy. Further details on the **international cooperation** strategy and targeted impacts for international cooperation will also be added.

Content

The present document consists of General Orientations and six annexes corresponding to the six clusters of Pillar II, Global Challenges and European Industrial Competitiveness. Annex 7 describes mission areas and possible partnerships in further detail.

The **General Orientations** bring to the debate the possible impacts to be targeted with the future Strategic Plan. They also outline the challenges that the EU is currently facing and the drivers that are likely to exacerbate them. They refer to the key EU policy objectives and responses to these challenges and outline how to target research and innovation impacts for achieving these objectives. This part also briefly describes research and innovation policy priorities and specific issues that will be taken into account during the implementation of Horizon Europe, as well as shared objectives and coordination of relevant activities throughout Horizon Europe. Finally, it presents the novel instruments and approaches for maximising the targeted impacts: the missions and partnerships in Horizon Europe.

Cluster 1, '**Health**', aims to promote and protect human health and well-being, prevent diseases and decrease the burden of diseases and disabilities on people and communities, support the transformation of health care systems in their efforts towards fair access to innovative, sustainable and high quality health care for everyone, and foster an innovative, sustainable and globally competitive European health industry. Research and innovation actions under this cluster will be key to address the health-related challenges and drivers delivering new knowledge and capabilities, improving our understanding of health and diseases, developing innovative methodological and technological solutions to better manage health and diseases, and designing sustainable approaches for the digital transformation and delivery of integrated and person-centred health and care services supported by needs-driven innovation and reliable supply chains in Europe.

Cluster 2, '**Culture, Creativity and Inclusive Society**' aims to meet EU goals and priorities on enhancing democratic governance and citizens participation, and on the safeguarding and promotion of cultural heritage, and to respond to multifaceted social, economic, technological and cultural transformations. Activities will contribute to expanding civic engagement, boosting transparency, accountability, inclusiveness and legitimacy of governance, improving levels of trust and tackling political extremism. Activities within the Cluster will also promote better access and engagement with cultural heritage and improve its protection, enhancement and restoration. Research and innovation will support sustainable growth and job creation through contributing to a European industrial policy for the cultural and creative industries. At the same time, actions will help tackle social, economic and political inequalities, support human capital development and contribute to a comprehensive European strategy for inclusive growth. This also involves understanding and responding to the impacts of technological advancements and economic interconnectedness with a view to social resilience. Finally, the Cluster will support EU migration and mobility policies, both internal and external, while aiming to promote integration.

Cluster 3, '**Civil security for Society**', aims to contribute to protecting the EU and its citizens from the threats posed by crime and terrorism (including in the cyber environment) and from the impacts of natural and man-made disasters. As shown in Eurobarometer surveys, security is one of the main concerns of EU citizens and is therefore among the top priorities for the Commission. Modern security threats are evolving rapidly, and technological and societal changes are creating unprecedented complexity, but so also are

opportunities for addressing them more efficiently. In this regard, security research provides the resources to be able to adequately counter current threats, by enabling the availability of state of the art equipment and knowledge. Furthermore, by working to anticipate future threats, security research develops today the capabilities that will be needed in the future.

Cluster 4, '**Digital, Industry and Space**' will advance key enabling, digital and space technologies, underpinning the transformation of our economy and society, support the digitisation and transformation of European industry and contribute to securing global industrial leadership and autonomy in terms of technologies and resources. Furthermore, activities with the Cluster will contribute to growing a low-carbon, circular and clean industry respecting planetary boundaries and to fostering inclusiveness in the form of high-quality jobs and societal engagement in the use of technologies. Thereby it will contribute to addressing the challenges European industry is facing, such as its reliance on imported key technologies and raw materials, the scarcity of resources including energy, as well as skills mismatches and ethical considerations relating to technological progress.

Cluster 5, '**Climate, Energy and Mobility**', aims to fight climate change while improving the competitiveness of the energy and transport industries as well as the quality of the services that these sectors bring to society. This entails establishing a better understanding of the causes, evolution, risks, impacts and opportunities of climate change, as well as making energy and mobility systems more climate- and environment-friendly, smarter, safer, and more resilient, inclusive, competitive and efficient. Actions of this Cluster will contribute to the technological, economic and societal transformations required to achieve climate neutrality and to ensure a socially fair transition, as outlined in the Commission's long-term strategy (adopted in November 2018).

Cluster 6, '**Food, Bioeconomy, Natural Resources, Agriculture and Environment**' will advance knowledge, expand capacities and deliver innovative solutions to accelerate the transition towards the sustainable management of natural resources (such as biodiversity, water and soils). This will include measures for: climate adaptation and climate neutrality of sustainable primary production (agriculture, forestry, fisheries and aquaculture), value chains, food systems and bio-based industries; optimising ecosystem services including for climate mitigation; reversing biodiversity decline; and reducing environmental degradation and pollution. Activities will benefit people and society by promoting safe and healthy food as well as human well-being, including through a better understanding of consumer behaviour. Furthermore, activities will help to develop vibrant rural and coastal areas and to establish governance models for the transition towards sustainability. To this end, actions under this Cluster will lead and support the switch to a competitive, more circular and bio-based, climate-neutral, resilient and environmentally-friendly economy in compliance with the Paris Agreement on Climate Change and the United Nations Sustainable Development Goals.

A starting point for further debate and new ideas

This document is based on a comprehensive set of sources, has been the subject of extensive exchanges with Member States and takes into account underlying analysis. It is not the Strategic Plan or its draft, but a starting point for debate and new ideas during the co-design process, including the public consultation during the summer 2019. The co-design process will also include the debates during the European Research and Innovation Days in Brussels from 24 to 26 September 2019, as well as other possible initiatives. To register and participate in the European Research and Innovation Days go to the [event website](#).

A dedicated implementation strategy is expected to be finalised at the end of 2019, timed in conjunction with the adoption of the Strategic Plan. The implementation strategy will cover, among other aspects, the organisation of calls, evaluation of proposals, grant agreements and project management. There will be a separate consultation later in the year on these practical issues which need to be put in place to help deliver the objectives of the new programme.

GENERAL ORIENTATIONS

1. Investing in research and innovation – shaping the future we want, together

With a proposed budget of 100 billion euro from 2021–2027, the Horizon Europe framework programme represents the largest collaborative multinational research and innovation investment in Europe and is open to participants worldwide. The European Union undertakes an investment of this magnitude because research and innovation is essential for finding new solutions to the challenges we are facing – and because the challenges are of such a magnitude that they cannot be addressed by one country alone. Research and innovation creates new opportunities, helps to tackle climate change, supports sustainable economic growth and the competitiveness of businesses and industries, and provides better public services for all Europeans. Research and innovation allows us to shape the future and the reality in which we want to live.

While European research and innovation is setting a world standard for excellence, the potential impact of investments in research and innovation is greatest when efforts have not only a rate, but also a direction. This view is reflected in one specific objective of Horizon Europe (art. 3, 2b), which is *to generate knowledge, strengthen the impact of research and innovation in developing, supporting and implementing Union policies and support the access to and uptake of innovative solutions in European industry, notably in SMEs, and society to address global challenges, including climate change and the [Sustainable Development Goals](#).*

The future Strategic Plan for Horizon Europe will put forward the targeted impacts for European Union research and innovation activities and the priorities for the first four years of implementation. The intention is thus to direct Horizon Europe investments where it matters most, within the overall objectives described above, supporting the achievement of the Union’s key policy goals, including the Sustainable Development Goals. Shaping the future we want, together.

The Sustainable Development Goals



2. The challenges we face and the forces that drive them

Our future is shaped by a multitude of factors that evolve and intersect in complex ways, as well as by the impact of today's decisions. Some may develop fairly rapidly and can lead to disruptions, while others develop more slowly. These **drivers** shape major social, economic, political, environmental and technological transformations of human activities, processes and perceptions. As these drivers develop in a relatively stable manner over time, we are able to anticipate with some degree of certainty possible challenges these forces will create to people, planet and prosperity if not appropriately addressed.

One of the best examples of such a driver is **demographic change**. As we live longer and populations, especially in Africa and Asia, will continue to grow, the global population is expected to reach approximately 8.6 billion in 2030 and 9.8 billion in 2050, while also growing older as a whole. These developments can have a wide range of implications on for example planetary resources, climate change, migration, health care and public spending.

As the populations of the eastern and southern parts of the world continue to expand, the centre of gravity in the world economy and global politics will continue to shift in the same direction. In Asia, a growing middle class with rising purchasing power will represent new market opportunities for European businesses but will also add to planetary strain. Africa will contribute the most to a rising population until 2050 and is a continent of opportunities where decentralised, digitally enabled solutions are flourishing. As **new powerhouses in the global economy** take their place on the international scene, established roles are brought into question and in some cases, the multilateral and rules-based world order can no longer be taken for granted. This creates an increasingly complex and volatile security environment for Europe, while also challenging the businesses and industries operating internationally.

Another important driver is increased mobility: across borders, and in particular within borders, towards cities. Most Europeans already live in cities today but more than two thirds of the global population will be living in cities by 2030. While uncontrolled **urbanisation** can lead to a number of challenges related to for instance poor infrastructure, abandoned rural areas and territories, inequalities and lower quality of life, urbanisation also represents opportunities as cities can be centres of innovations and can give people better access to basic goods and resources such as electricity and education.

Finally, **scientific and technological developments**, not the least within digitisation, will continue to transform our society. The process of innovation has been shortened significantly while the amount of disruptive and market-creating innovation has increased, also due to new innovative companies and methods of innovation. These developments provide endless new opportunities and will enable us to better address global challenges across the board. However, each new opportunity can also challenge established business models and social structures, possibly affecting almost every aspect of life.

These drivers will shape a range of overarching **challenges** which Europe will have to face now and in the future.

Climate change and environmental collapse: humanity is overstepping planetary boundaries and the outcome runs the risk of being irreversible

The rapidly growing global population combined with unsustainable production and consumption patterns, is putting our **planet under pressure**. As human activities touch or overstep planetary boundaries we are depleting natural resources such as soil, water and air, threatening biodiversity and ecosystems and jeopardising our ability to meet the needs of future generations. Our consumption of energy is a particular concern, as the development and use of sustainable energy sources and systems are struggling to keep up with a rising global demand. The impact of climate change, already evident in extreme weather events such as droughts and wildfires across Europe, will continue to increase across the globe unless global warming is limited to 1.5 °C. The United Nations Intergovernmental Panel on Climate Change has assessed that while the limitation of global warming is possible, doing so will require unprecedented changes in our ways of life, towards sustainable societies and economies.

Future prosperity and sustainable growth: increased global and un-ruled competition is a test of our competitiveness and sovereignty

While climate change and the transition towards sustainable development will affect many aspects of today's European society and industry, especially in coal- and carbon-intensive regions and sectors, Europe has a good starting point for transforming challenges into new business opportunities and disseminating solutions around the world. Europe is, perhaps more than any other region, focused on furthering competitiveness in a sustainable manner, supporting new and innovative approaches in companies big and small, and European firms already represent five of the ten biggest clean-tech companies in the world. In other sectors, European businesses struggle to stay competitive or scale up – for instance, there is no European company among the largest 15 companies in the digital sector. As technological developments become more and more important **for ensuring prosperity and sustainable growth**, Europe cannot risk being solely dependent on foreign nations to develop the digital and other technological innovations needed to address the challenges of tomorrow.

European security and the well-being of our citizens: an increasingly multipolar world and the rise of global and internal insecurity puts our social contract, societal values and welfare model and the future of work under pressure

Finally, these and other developments are creating an increasingly uncertain, complex and ambiguous world, which is leading many citizens to experience justified insecurity about the changes to come. For instance, for the citizen, technological developments, particularly within robotics and digitalisation, will most likely require the acquisition of new skills and can raise legitimate concerns about the impact on employability, the quality of jobs in the future, and the wider implications for society. Increased urbanisation can lead to a perception of unequal opportunities between rural and urban regions and demographic changes can increase pressure on public spending, for example with people suffering increasingly from age-related diseases and disabilities increasing the demand for health and care services. And while the European values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights are the foundations of an open, fair, cohesive and inclusive society, there are citizens that are losing trust in these values and putting into question the functioning of established institutions in the European Union and its Member

States. Making sure we are putting **people at the center**, focusing on citizens' needs and concerns while managing the transitions we are facing, is a central challenge in this regard.

These daunting challenges call for a radical new approach for developing and deploying new technologies and innovative solutions for citizens and the planet on a scale and at a speed never achieved before, and for adapting our policy and economic framework to turn global threats into new opportunities for our society, businesses and economy.

This requires stepping up and strategically planning research and innovation investments and supportive measures.

Sources

The description of drivers and challenges in this section is based on extensive analysis and foresight, including in: [Beyond the Horizon: foresight in support of future EU research and innovation policy](#); [Reflection paper: Towards a Sustainable Europe by 2030](#); [Global Trends to 2030: Challenges and choices for Europe](#); [Europe in May 2019: Preparing for a more united, stronger and more democratic Union in an increasingly uncertain world](#); [The European Union: A people-centred agenda](#); [OECD Science, Technology and Innovation Outlook 2016](#)

3. The future we want - targeting the impact of Horizon Europe

Investing in research and innovation through Horizon Europe will help steer the transitions in Europe towards a sustainable, fair and prosperous future, a cleaner and healthier planet and the well-being of European citizens. It will impact on the direction and speed of these transitions, and on the rate at which business will develop, scale-up and commercialise innovative solutions. It is expected to play a vital role, in combination with other interventions, for creating new solutions and fostering innovation, both incremental and disruptive. At its simplest, Horizon Europe, and in particular its second Pillar, will help create a future where European citizens are healthier and more prosperous and live in a fair and inclusive society that achieves environmental sustainability and respects planetary boundaries.

Therefore, in order to maximize the impact of Horizon Europe investments, it is necessary to strategically prioritise and direct a substantial part of the funds towards the areas where we believe they will matter the most, supporting the achievement of the Union's key policy goals.

Future policy priorities

The European [Commission contribution](#) to the [Sibiu Summit](#) on 9 May 2019 makes five recommendations for the EU's next strategic agenda 2019-2024, highlighting how Europe can shape its future in an increasingly multipolar and uncertain world. The document emphasises the need to focus research and innovation on the ecological, social and economic transitions and related societal challenges. In addition, it underlines that Europe also needs to leverage its scientific strengths into leadership in breakthrough and disruptive innovation. The Strategic Agenda for 2019 – 2024, adopted by the [European Council](#) on 20 June 2019, targets similar overarching objectives.

The future policy priorities for the Union are:

- 1) A Protective Europe, concerning security and defence policy (European Council: protecting citizens and freedoms);
- 2) A Competitive Europe, which focusses on research and innovation, new technologies, digital capacities and industrial policy (European Council: developing a strong and vibrant economic base);
- 3) A Fair Europe, which centres on social inclusion, health, rule of law and fundamental rights (European Council: building a climate-neutral, green, fair and social Europe);
- 4) A Sustainable Europe, regarding sustainable development, climate change, circular economy and energy (European Council: building a climate-neutral, green, fair and social Europe);
- 5) An Influential Europe, dealing with international cooperation, promoting European values and standards (European Council: promoting European interests and values on the global stage).

Together with the Sustainable Development Goals, these priority areas can be seen as shaping future EU policy responses to face the challenges and support the transitions affecting Europe. European research and innovation can act as an enabler and a driver for each of these priorities – though not in equal measures across all priority areas, and in a variety of complex and interchanging manners that goes beyond what can comprehensively be described in the

following text. Europe is investing in and acting upon challenges in all these areas, also through Smart Specialisation Strategies established under Cohesion Policy, and we will build on these strong foundations. For example, activities carried out within the FET Flagships on Graphene, the Human Brain Project and Quantum Technology, which are supported under Horizon 2020, will continue to be supported under Horizon Europe through calls for proposals included in the work programmes.

Within each of the future policy priorities identified, a more strategic and targeted approach to European research and innovation investment is needed to maximise the impact of Horizon Europe on the future we want.

1) Protective Europe

Policy objectives: While the establishment of the European Union in itself has brought unprecedented peace and prosperity, there is a continued need to address terrorism and security issues, which are among the top concerns for European citizens, and to enhance internal security within and across the European Union and along its external borders. The overarching ambition of secure societies is also reflected in Sustainable Development Goal 16 – Peace, Justice and Strong Institutions.

There are a number of EU policy responses to current security challenges. As regards disasters, these include the Union Civil Protection Mechanism, the EU Adaptation Strategy and the Sendai Framework for Disaster Risk Reduction (2015-2030). In the framework of the European Agenda on Security and as part of the development of a Security Union, the EU has adopted policies and instruments on integrated border management, on protection of public spaces, on security (including cybersecurity) of infrastructure and on fighting crime, including cybercrime and terrorism. An EU Maritime Security Action Plan addresses relevant challenges. Policies have also been put in place to ensure cybersecurity, such as the Directive on security of network and information systems (NIS Directive) and the EU Cybersecurity Act, and online privacy.

Research and innovation activities can support these policies in various ways. **Investments in research and innovation** in particular within **civil security for society** (Cluster 3) will contribute to creating ‘*a resilient and more stable Europe that protects*’, especially with the following impacts:

- **Improved disaster risk management and societal resilience** through better understanding of natural and man-made disasters and by the development of novel concepts and technologies to counter these risks;
- **Improved management of EU external borders** (air, land and sea) by the development of tools and concepts towards an Integrated Border Management, including better knowledge of societal factors with regards to border security;
- **Better protection of public spaces** through novel methods to detect weapons, explosives and other dangerous items and by quicker response to threats without changing the open character of public spaces in the EU;

- **Improved security and resilience of infrastructure and vital societal functions** enabled by improved risk assessments and more efficient response to disruptions with a view of quickly restoring performance levels;
- **Improved maritime security** based on the EU Maritime Security Research Agenda to counter threats such as trafficking, piracy as well as cyber and hybrid threats;
- **More effective fight against crime and terrorism** through better understanding of societal factors leading to radicalisation and crime and by developing state of the art capabilities for Law Enforcement Agencies in the EU, notably against cybercrime;
- **Increased cybersecurity** based on more effective use of digital technologies, strong orientation on privacy and fundamental rights and a robust digital infrastructure to counter cyber-attacks.

2) Competitive Europe

Policy objectives: Research and innovation plays a central role in enhancing competitiveness throughout Europe and Europe has the potential to become a world leader in the ongoing and foreseeable sustainable and digital transitions. However, there is a need to prepare our technological and industrial future in a more strategic way, including incentivising and steering innovation and facilitating the uptake of new technologies and innovative solutions. New developments within mobility and transport, including automated and connected mobility, will also require new solutions, still to be developed and implemented. Furthermore, the need to promote inclusive and sustainable economic growth and industrialisation and to foster innovation is reflected in Sustainable Development Goals 8 - Decent Work and Economic Growth, and 9 - Industry, Innovation and Infrastructure.

The renewed EU Industrial Policy Strategy shows how the EU must tackle missing segments in key strategic value chains if its industry is to stay competitive and become sustainable at the same time. This requires a stepping up of the level and quality of the EU research and innovation effort with focus on the key parts of strategic technology supply chains: from secure and sustainable supply of raw materials, maximising the value of its resources and materials, to batteries, low-carbon industry, critical components for space and smart connectivity platforms. At the same time, breakthrough technologies and solutions are necessary to bring about a deep decarbonisation of EU industries by 2050 and foster a circular economy. Future factories will be carbon-neutral, resource efficient and fully integrated in the circular economy. The zero-carbon and circularity ambitions should reinforce one another.

New and emerging technologies are a key focus area for current EU investments in research and innovation. Further **investments in research and innovation** in particular regarding **digital, industry and space** (Cluster 4) will contribute to the following impacts:

- **More appealing and creative jobs in Europe**, by way of an industrial and digital transformation;
- **Increased autonomy in critical raw materials** through substitution, efficiency and recycling and primary production;

- **Increased industrial leadership in key enabling and digital technologies and uptake of new technologies** through technology infrastructures and autonomy in strategic value chains;
- **Climate-neutral, circular and clean EU industries** by, for instance, creating plants in several regions with zero emissions and zero waste in the fight against climate change and the protection of the environment by helping to develop the necessary breakthrough technologies and solutions;
- **Increased inclusiveness** by making a two-way engagement in the development of technologies a reality, and by helping foster the skills agenda in, for instance, the digital area or advanced manufacturing area.

Investment in research and innovation regarding **health** (Cluster 1) will support an innovative, sustainable and globally competitive health-related industry, while investments in research and innovation for **mobility and transport** (Cluster 5) will contribute to developing low-carbon and competitive transport solutions across all modes.

3) Fair Europe

Policy objectives: The promotion of social cohesion and inclusiveness and the health and well-being of its people are central aims of the European Union's policies and programmes. With the European Pillar of Social Rights, the EU set the direction towards a fairer, inclusive and more social Europe for all European citizens based on a European social model that is fit for the challenges of the 21st century. To continue delivering on this agenda and to safeguard shared values and mutual trust, it is important to support Member States in addressing social challenges and inequalities, for example related to health or education, within and across their territories and regions. Further efforts should also be devoted to making high-quality health care both available and affordable for citizens as well as to rendering health care systems more accessible and sustainable, including through the digital transformation of health and care.

These aims are also reflected in Sustainable Development Goals: 1 – No Poverty; 3 – Good Health and Well-being; 4 – Quality Education; 5 – Gender Equality; 6 – Clean Water and Sanitation, 8 – Decent Work and Economic Growth; 10 – Reduced Inequalities; 11 – Sustainable Cities and Communities, and 16 – Peace, Justice and Strong Institutions.

Investments in research and innovation, in particular within **health** (Cluster 1) will target and contribute to the following impacts:

- **Healthy citizens in a rapidly changing society:** citizens stay healthier throughout the life course due to improved health promotion and disease prevention, and supported by healthier behaviours and lifestyles;
- **Healthy and health-promoting living and working environments:** policy-makers and industry take better account of the environmental factors for health and well-being and promote/support healthy and health-promoting living and working environments;

- **Effective health services to tackle diseases and reduce the burden of diseases:** patients can rely on effective health services to tackle their diseases, as well as to reduce the burden of diseases on them, their families and communities;
- **Improved access to innovative, sustainable and high-quality health care:** health systems are able to provide timely access to affordable health care services of high-quality to everybody while being environmentally and fiscally sustainable;
- **Unlocking the full potential of new tools, technologies and digital solutions for a healthy society:** new tools, technologies and digital solutions provide significant gains in health outcomes, address unmet medical needs and inform regulatory standards and requirements;
- **A sustainable and globally competitive health-related industry in the EU:** health industries, including SMEs, increase their productivity and sustainability in developing health innovation due to the potential of data-enabled research and development, the related convergence of pharmaceutical, digital and medical technologies, and the prospect of the digital transformation of health and care supported by data-driven manufacturing of tailor-made products and the delivery of personalised services.

Investments in research and innovation, in particular concerning **culture, creativity and inclusive society** (Cluster 2) will target and contribute to the following impacts:

- **Enhanced democracy and governance** through bolstering the accountability, legitimacy, transparency and effectiveness of democratic systems and the protection of the rule of law;
- **Better approaches to tackling political extremism and polarisation** by strengthening democratic participation and active citizenship, fostering awareness and exercise of democratic rights, and understanding the role of media in fostering or inhibiting political dialogue;
- **Reversing socio-economic and gender inequalities** via strategies of inclusion, non-discrimination, social protection and social investment;
- **Improved understanding of societal – including political, ethical and economic - effects of technological advancements and the impact of drivers of change** on jobs, skills, productivity, income, welfare and inequalities;
- **A novel growth model** respectful of inclusiveness and upward socio-economic convergence and resilient to economic, social, and financial shocks;
- **Increased use of evidence-based strategies in the management of mobility and migration and the integration of migrants in European society;**
- **Better valorisation of European cultural heritage** by promoting the value, protection, access to and sustainable use of European cultural heritage and its contribution to the cultural and creative sectors.

Investments in research and innovation concerning **digital, industry and space** (Cluster 4) will also aim to contribute to creating more appealing and creative jobs in Europe and increased inclusiveness in the development of technologies and the acquisition of skills to put the new technologies, for instance the digital area or the area of advanced manufacturing, to use.

4) Sustainable Europe

Policy objectives: Significant changes are needed to modernise our economy towards sustainable consumption and production patterns, reinforce efforts to fight climate change and reverse environmental degradation, promote biodiversity and support the transition to a circular economy, respecting planetary boundaries. This includes promoting a cleaner and more reliable energy supply to households and businesses.

These objectives also are reflected in especially Sustainable Development Goals 2 - Zero Hunger, 6 - Clean Water, 7 - Affordable and Clean Energy, 11 - Sustainable Cities and Communities, 12 - Responsible Consumption and Production, 13 - Climate Action, 14 - Life below Water and 15 - Life on Land.

In the areas of climate change and planetary boundaries, the EU is at the forefront of implementing the Paris Agreement. EU has already put in place the legislation required to reach the Nationally Determined Contribution for 2030, and the Commission has adopted a vision for achieving a climate neutral economy by 2050. The long-term strategy outlines a vision of the technological, economic and societal transformations required to achieve climate neutrality and to ensure a socially fair transition that does not leave any EU citizens or regions behind. It recognises that a forward-looking research and innovation strategy should be guided by zero-carbon solutions that have the potential to be deployed by 2050 and that climate action is at the heart of Horizon Europe, with the intention of devoting 35% of the budget to climate objectives. In January 2019, the Commission adopted the reflection paper ‘Towards a Sustainable Europe by 2030’, with the intention of launching a forward-looking debate among citizens, Member States and other stakeholders on how to best progress with the Sustainable Development Goals.

Investments in research and innovation in particular concerning **climate, energy and mobility** (Cluster 5) will contribute to transforming the EU to a climate-neutral and resilient society, and target impacts especially in the following fields:

- **Advanced climate science and solutions;**
- **Novel competitive cross-sectoral solutions for decarbonisation** such as batteries, hydrogen, sustainable infrastructure enabling low carbon solutions and other breakthrough technologies;
- **A novel energy system** centred on renewables and ensuring cost-efficient, greenhouse gas neutrality;
- **New demand side solutions to decarbonise the energy and transport systems;**
- **Reduction of greenhouse gas emissions;**

- **Increased adaptation of production systems** within rural and urban areas to climate change;
- **Reinforced bio-economy** to supply sustainable biomaterials and bio-energy whilst staying within ecological boundaries (in collaboration with Cluster 6).

Investments in research and innovation concerning in particular **food, bio-economy, natural resources, agriculture and environment** (Cluster 6) will advance knowledge, build capacities as well as develop and demonstrate innovative solutions that will accelerate the transition to a sustainable management and use of natural resources from land and sea, ensuring ecosystem integrity as well as sustainable development and human well-being, including food and nutrition security, in the EU and globally. The following impacts will especially be targeted:

- **Reduction of greenhouse gas emissions and successful adaptation** of ecosystems and production systems as well as rural, coastal and urban areas to climate change;
- **Halt of biodiversity decline and restoration of ecosystems;**
- **Sustainable and circular management and use of natural resources;** prevention and removal of pollution; healthy soils and clean water and air for all; attractive jobs, enhanced value creation and competitiveness;
- **Establishment of new primary production, food and bio-based systems based on sustainability,** inclusiveness, health and safety; food and nutrition security for all;
- **Behavioural, socio-economic and demographic change are well understood** and drive sustainability; a balanced development of vibrant rural, coastal, peri-urban and urban areas;
- **Establishment of new governance models enabling sustainability.**

Investments in research and innovation concerning **digital, industry and space** (Cluster 4) will also contribute in particular to breakthroughs in low-carbon, clean and circular industries.

5) Influential Europe

Policy objectives: In an increasingly fractured and multipolar world, the EU will need to strengthen its position in order to guarantee its prosperity and competitive position. Through EU **international cooperation** in research and innovation, the EU can shape new technologies and solutions to global challenges, set world standards and disseminate its values.

Innovation value chains and knowledge production are increasingly global and previously emerging economies have become major players in the research and innovation area. The EU is well placed to tap into this new wealth of research excellence and resources across the world. It has a long history of international cooperation within research and innovation, lies at

the centre of most international collaborative networks and offers a general openness to international participation. The EU needs to build upon and further intensify this to fully benefit from the new global opportunities. Activities should promote and integrate international cooperation based on mutual benefits, EU interests, international commitments and, where appropriate, reciprocity, with each area developing its strategy for engaging internationally, in coherence with the overall EU strategy for international cooperation in research and innovation.

The Sustainable Development Goals are increasingly providing a reference point to prioritising and reshaping research and innovation policy agendas, and international programmatic coordination through multilateral initiatives is used more and more as a means for global cooperation in areas such as climate change, biodiversity, clean energy, sustainable cities, infectious diseases, seas and oceans, sustainable agriculture, and food and nutrition security. The expanding scope and interconnectivity of these challenges require the EU to strengthen its role in multilateral and bilateral setups while also asserting EU values and interests more pro-actively, including in strategic alliances and networks such as global environmental conventions on climate, desertification and biodiversity, the Belmont Forum, the Group on Earth Observations, the Mission Innovation initiative, the International Bioeconomy Forum and a range of Global Health initiatives.

Increased attention is being paid to achieving sovereignty in strategic technology areas and critical infrastructures. Though no jurisdiction is fully autonomous in terms of design, development and production of enabling technology, in a world of globe-spanning value chains the EU should now do more to strengthen alliances with key actors in a strategic and principled way so as to ensure its competitive position.

International cooperation in research and innovation is indispensable for effectively tackling global challenges and for implementing global commitments. Collaborating with the world's top researchers, innovators and knowledge-intensive companies should strengthen the EU's research and innovation excellence and attractiveness, increase the quality of research and innovation results, and reinforce the economic and industrial competitiveness of the Union. Increasing international engagement should also lead to an enhanced EU role in setting research and innovation policy agendas and shaping global research and innovation systems and innovative solutions to global challenges.

Engaging internationally should allow for a better assessment of challenges in their global, regional or local context, produce more targeted results, expand and diversify the global flow of knowledge and increase innovation capacity, contributing also to more efficient EU responses in key areas of political dialogue. The growing role of science diplomacy as a key element of EU external action should also foster mutual understanding, stability and progress.

4. Supporting research and innovation policy priorities, specific issues and coordination of relevant activities through Horizon Europe

The impact and added value of European research and innovation investments will also depend on our capacity to leverage a number of cross-cutting factors when implementing Horizon Europe, ranging from core EU values to legal and operational provisions:

- Inclusion of gender perspectives will enable better quality and higher societal relevance of research and innovation activities;
- Interdisciplinarity and inclusion of Social Sciences and Humanities (SSH) is a prerequisite for addressing a number of societal challenges, which are cross-cutting by nature;
- The mainstreaming of open science across activities will enhance transparency and enable dissemination of results;
- Dissemination and exploitation will also be supported through targeted support actions to reach relevant stakeholders;
- Key Enabling Technologies will be supported to enhance Europe's competitiveness in strategic value chains;

Similarly, the overall impact of Horizon Europe will be increased by ensuring awareness of shared objectives and coordination of relevant activities across the different parts and instruments of the programme including via:

- support to frontier research which enables new discoveries and high risk projects;
- build up research capacity both in terms of human- and technical means, across the European Research Area (ERA);
- support for the conversion of research into innovation and for new businesses opportunities, and an innovative Europe based on strong interconnected innovation ecosystems composed of innovators, startups, businesses, universities and foundations that work together to deliver disruptive and market-creating innovations.

Cross-cutting research and innovation policy priorities and specific issues

Gender equality is a core policy objective for all European Union activities and a crucial factor in the achievement of sustainable development and inclusive economic growth. Activities will aim at eliminating gender inequalities throughout research and innovation systems and the gender dimension will be adequately integrated in research and innovation content across the whole programme. The latter is particularly relevant for global challenges, including in areas such as health care, artificial intelligence and robotics in which there is a growing worldwide recognition that gender differences, in terms of needs, behaviours and attitudes, play an important role in research design/content, and hence determine the societal relevance and quality of research outcomes.

The challenges we are facing today are of such a nature that few can be addressed through one scientific discipline alone. **Social sciences and humanities** (SSH) are key in understanding how human behaviour shapes not only global challenges, but also the effectiveness of the solutions we propose to meet them. For instance, SSH can contribute to our understanding of how best to engage citizens in addressing pressing concerns such as

climate change and how to exploit new technologies in a way that is focused on citizens' needs and concerns.

In addressing and understanding citizens' expectations and concerns, SSH contributes to strengthening society's ability to embrace and drive change, whether economic, social or cultural, and can thus contribute substantially to achieving many targeted impacts across the programme. Furthermore, SSH helps to better understand the socio-economic impact of research policy itself and enhance its societal impact in the future.

Open science practices will be mainstreamed as the new *modus operandi* for EU research and innovation. Particular focus will be placed on open access to scientific publications and research data, management of research data along the FAIR principles, development and consolidation of the European Open Science Cloud (EOSC) to provide a trusted and open common interoperable framework for federating infrastructures, platforms and associated services for data-driven research for all researchers and innovators, and responsibility and openness of science towards society and vice versa. Open access to research data will be the general rule, ensuring the possibility of exceptions following the principle 'as open as possible, as closed as necessary'. Open science will increase the quality of science and productivity of research and will accelerate the pace and uptake of innovation to deliver on societal, economic and technological challenges. It also promises to give Europe a global lead in research data management. Engaging and involving citizens, civil society organisations and end-users in co-design and co-creation processes and promoting responsible research and innovation will improve trust between science and society, and the uptake of scientific evidence-based public policies and innovative solutions.

Overall attention will be paid to and specific actions will be launched for promoting **ethics and research integrity** and continue developing a coherent framework of adherence to the highest ethics standards and the principles embedded in the European Code of Conduct for Research Integrity.

Activities to **disseminate and exploit results** from research and innovation will be an important and integral part of Horizon Europe, promoting public outreach. Enhanced dissemination and exploitation are strategic matters for the success of Horizon Europe and for the achievement of impact on society at large and synergies with other programmes. In addition to the initiatives towards open science mentioned above, Horizon Europe will support actions such as clustering and packaging results and/or data for target audiences and networks.

The availability of top-quality human resources and the **effective circulation of knowledge between research, industry and higher education** is a pre-requisite for maximizing the impact of European research and innovation investments. Integrating research and innovation activities with education and training, and supporting activities for knowledge exchange and transfer across sectors, for instance via Marie Skłodowska-Curie Actions and Knowledge and Innovation Communities (KICs), is a powerful means to ensure research and innovation activities are informed by and directed towards citizens' and society's needs and the results are widely disseminated.

In many instances, new discoveries within basic research create the foundations for research and innovation impacts and lead to a wide range of innovations applicable to our everyday lives. **Key Enabling Technologies (KETs)**, for instance biotechnologies and advanced materials, are crucial for Europe's competitiveness in strategic value chains. Developing and mastering KETs can contribute towards giving EU industries the competitive edge they need for industrial leadership in global markets and promise breakthroughs to solving global challenges and achieving a circular, resource efficient and climate-neutral EU economy. Hence, in addition to the Cluster "Digital, Industry and Space", which will help develop these technologies often as "general purpose technologies", the other clusters will also develop and apply key enabling and emerging technologies as part of a common strategy to promote the EU's industrial and social leadership. Moreover, Pillar I of Horizon Europe, Excellent Science, will contribute scientific breakthroughs and the research infrastructures needed to develop key enabling technologies at their earlier phases, while Pillar III, Innovative Europe, will support breakthrough innovations based on KETs.

Shared objectives and coordination of relevant activities throughout Horizon Europe

While Pillar II, Global Challenges and European Industrial Competitiveness, is the main focus of the strategic planning process, actions within other parts of Horizon Europe will play an important role in reaching the impacts targeted via Pillar II or supporting and complementing its activities – just as activities based in Pillar II will support activities in other Pillars.

Relevant activities in Pillar I – Excellent Science

The European Research Council (ERC) will continue to pursue ground breaking, high-gain/high-risk research and to advance the frontiers of knowledge through competitive funding and support to investigator-driven frontier research across all fields, on the basis of scientific excellence. ERC-funded research can thus open the way to new and often unexpected scientific and technological results, which can also drive innovation and business inventiveness and contribute to tackling global and societal challenges.

The Marie Skłodowska-Curie Actions (MSCA) will continue to support and train the people behind research and innovation, delivering highly skilled talent to society and the economy, not only creating impact on individual researchers' careers, but also on organisations, notably universities, by strengthening excellent doctoral programmes, researcher training and career development systems across the ERA in a fully bottom-up and competition-for-excellence-based manner. In particular, the MSCA will continue to contribute significantly to excellent research, boosting jobs, growth and investment, by equipping researchers with new knowledge, skills and international, interdisciplinary and inter-sectoral experience to solve current and future societal challenges, and fill the top positions of tomorrow.

Research Infrastructures will continue to extend the frontiers of knowledge by providing state of the art services to research and innovation communities, thus contributing to the objectives of the clusters and missions supported in Horizon Europe. Supporting research infrastructures at the EU level reduces fragmentation in the landscape of national and

regional infrastructures and strengthens the European Research Area as well as avoiding duplication of efforts and maximising impact. As these research infrastructures will be connected to the European Open Science Cloud (EOSC), the researchers involved will have access to most of the data generated and collected by research infrastructures as well as to high performance computing (HPC) and exascale resources deployed under the European Data Infrastructure (EDI).

Relevant activities in Pillar III – Innovative Europe

A balanced approach between research and innovation as well as, within innovation, technological, non-technological and social innovation is a central part of Horizon Europe. **The balance between research and innovation** is thus reflected in the design of Horizon Europe as a whole, which spans the whole range of Technology Readiness Levels from curiosity-driven research to commercially-driven innovation and support to market deployment.

However, as evidenced by the 2018 edition of the European Innovation Scoreboard, Europe is stronger in science than in innovation. In particular, it is significantly lagging behind global competitors in terms of its capacity to turn scientific excellence into innovation. To become a global innovation leader, Europe needs to implement a range of measures to accelerate innovation along the full value chain and support a new generation of innovative lean start-ups capable of scaling-up and becoming “unicorns” (a privately held startup company valued at over \$1 billion) and tech giants.

This imperative has driven the design of Pillar III of Horizon Europe. The core feature is the **European Innovation Council** (EIC) that will enhance Europe’s capabilities at the forefront of the next wave of disruptive, market-creating innovation. It will be the one-stop shop for enabling innovators to bring the most promising ideas to real world application, and will support the scaling-up of innovative start-ups and companies. The EIC will thus play an important role in ensuring that excellent research, including within future and emerging technologies and other Pillars of Horizon Europe, is transformed into practical solutions that address the challenges we are facing.

In particular, the EIC’s Pathfinder will actively support the development of breakthrough technologies, which are key to disruptive innovations. The EIC’s Pathfinder transition activities and the EIC’s business acceleration services will nurture radical thinking around such breakthrough technologies so as to stimulate disruptive innovations and support innovators in developing these up to business readiness. Finally, the EIC’s Accelerator will actively bridge the “valley of death” and bring any market creating innovation, including social innovation, closer to market operators and investors and support the scaling-up of companies. The implementation of Pillar II will benefit from the possibilities offered by this instrument, open to any business-ready European innovation whatever its origin.

However, this will prove insufficient if not echoed throughout Europe. **European Innovation Ecosystems** - public and private, national and local - will need to be interconnected, including with the EIC, to ensure that resources, notably talent and first customers, are accessible to innovative start-ups and all forms of innovation, to allow them to

continue growing in Europe while taking advantage of international markets to become global leaders in the sustainable transitions supported through Pillar II.

Thanks to their societal challenge-driven approach and their portfolio of activities, ranging from entrepreneurial education and training to innovation projects, business creation activities and support services for startups, scaleups and SMEs, the **EIT Knowledge and Innovation Communities (KICs)** are well equipped to develop synergies and complementarities with the activities of Pillar II. In particular, EIT KICs can mobilize a wide range of stakeholders (e.g. companies, universities and research centres, cities and regions, and financial partners) within their ecosystem to participate in the activities. This will help pilot initiatives as necessary, improve the market exploitation and commercialization of results funded by the clusters, facilitate conversion into new businesses activities and promote the uptake of entrepreneurial skills among researchers and innovators

Other Union programmes such as **InvestEU** will also be taken into account when designing and planning activities, to ensure that whenever needed any relevant result is nurtured into innovation and effectively deployed and exploited.

Relevant activities in the part Widening Participation and Strengthening the European Research Area

The excellent and responsible research, cross-border collaboration and ground-breaking innovation supported by Horizon Europe will, in different ways, strengthen and reinforce research and innovation systems across all Member States and Associated Countries.

Measures supported under the part **Widening participation and spreading excellence** will over time underpin and amplify the impact of Horizon Europe by helping countries that are lagging behind, including the EU outermost regions, to contribute to actions under other parts of Horizon Europe.

This could be achieved by a wide range of activities including enhancing research and innovation capacity, spurring national reforms, facilitating brain circulation, launching measures for promoting excellence, creating new collaborative networks across the EU and supporting the opening of established networks to applicants from widening countries.

Impacts will range from creating new or upgrading existing centres of excellence (Teaming) and significantly improving the research and innovation capacity of universities and research organisations (Twinning) to attracting and maintaining high quality human resources in research organisations ('ERA Chair holder') and ensuring scientific networking, capacity building and career development support to researchers at all career stages (COST actions).

The part on **Strengthening the European Research Area** will support a new phase in the development of the European Research Area and synergies with the European Higher Education Area, which may include a stronger focus on supporting the challenges identified in Pillar II, including missions and partnerships, to ensure that the strategic investments made there deliver maximum impact.

Opening the European Research Area to future challenges requires developing synergies with the European Higher Education Area in a complex landscape of universities and research

organisations with a view to underpinning open science, innovative entrepreneurial practices, life-long-learning and upskilling talent and breaking down disciplinary and inter-sectoral research barriers to match emerging business and societal needs.

Impacts will include better alignment of national reforms and increased programme level collaboration across Member States and Associated Countries, and will help increase the impact of both national and European investments in research and innovation. This will also support other research and innovation priorities including Open Science, citizens' science, gender equality and other forms of diversity, improving international cooperation, ethics and integrity, and scientific input to other EU policies.

In addition, the evidence base for policymaking across all these domains will be further developed, including through economic analysis of research and innovation policies and performance, design of research and innovation strategies, work to refine indicators and to develop new ones, when needed in cooperation with international organisations and foresight.

5. New approaches and instruments for maximising impact – missions and partnerships

Horizon Europe uses a variety of targeted instruments and approaches to more efficiently direct research and innovation investments and maximise the impact of investing public funds towards achieving global challenges and European policy objectives. Among the tools to implement the programme are missions and partnerships, missions being a completely new approach, while the approach to partnerships has gone through a major reform based on the experience of Horizon 2020.

The common aim is to tackle global challenges, in particular in line with the Sustainable Development Goals, in a coordinated way through creating scale and critical mass, integrating demand-side policies and engaging with end-users.

Partnerships will allow to combine and coordinate a broad range of (mainly existing) research and innovation activities to address common priorities jointly with Member States, the private sector, foundations and other stakeholders. Missions will spark and steer (mainly new) research and innovation activities to achieve targeted, ambitious and measurable goals which speak to citizens, engaging with and leveraging policies and actors well beyond research and innovation.

The details and subjects to be covered by future European Partnerships and Missions are being developed through specific processes, closely involving Member States and stakeholders more broadly, and as part of strategic planning. More information regarding missions and partnerships can be found in Annex 7.

Missions

One of the main novelties of Horizon Europe is the introduction of missions: high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and society. Missions are intended to achieve a measurable goal within a set timeframe, with impact for science and technology and/or society and citizens that could not be achieved through individual actions. They are currently in the process of being defined and should stem from the following mission areas, which have been defined in the Horizon Europe agreement by Council and Parliament in April 2019:

- Adaptation to Climate Change, including Societal Transformation
- Cancer
- Healthy Oceans, Seas, Coastal and Inland Waters
- Climate-neutral and Smart Cities
- Soil Health and Food

Partnerships

The identification of the partnerships will be influenced by the outcome of the impact assessments and the strategic coordination process, as per the Horizon Europe legislative package.

Horizon Europe will support European Partnerships to deliver on global challenges and industrial modernisation through concerted research and innovation efforts with the Member States, the private sector, foundations and other stakeholders.

Partnerships provide mechanisms to consistently aggregate research and innovation efforts into more effective responses to the policy needs of the Union, developing close synergies with national and regional programmes, bringing together a broad range of actors to work towards a common goal, and turning research and innovation into socio-economic results. As such, they are powerful instruments to address global challenges by translating common priorities into concrete roadmaps and coordinated activities.

European Partnerships will be established for addressing European or global challenges only in cases where they will achieve objectives of Horizon Europe more effectively than the Union alone and when compared to other forms of support of the framework programme. They should adhere to the principles of Union added value, transparency, openness, impact within and for Europe, a strong leverage effect at a sufficient scale, long-term commitments of all the involved parties, flexibility in implementation, coherence, coordination and complementarity with Union, local, regional, national and, where relevant, with international initiatives or other partnerships and missions. Lastly, they should have a clear life-cycle approach, be time limited and include conditions for phasing out the Programme funding.

The European Partnerships may take any of the following forms:

Co-programmed European Partnerships: Participation in partnerships set up on the basis of memoranda of understanding and/or contractual arrangements between the Commission and private and/or public partners (such as industry, universities, research organisations, bodies with a public service mission at local, regional, national or international level, or civil society organisations including foundations and NGOs), specifying the objectives of the partnership, related commitments from all involved sides for financial and/or in-kind contributions of the partners, key performance and impact indicators, outputs to be delivered and reporting modalities. They include the identification of complementary research and innovation activities that are implemented by the partners and by the Programme;

Co-funded European Partnerships: Participation in and financial contribution to a programme of research and innovation activities, specifying the objectives, key performance and impact indicators, and outputs to be delivered, based on the commitment of the partners for financial and/or in-kind contributions and integration of their relevant activities using a Programme co-fund action;

Institutionalised European Partnerships: Participation in and financial contribution to research and innovation programmes undertaken by several Member States in accordance with Article 185 TFEU, or by bodies established pursuant to Article 187 TFEU, such as Joint

Undertakings, or by the EIT Knowledge and Innovation Communities in compliance with the EIT Regulation. Such partnerships shall be implemented only where other parts of the Horizon Europe programme, including other forms of European Partnerships would not achieve the objectives or would not generate the necessary expected impacts, and if justified by a long-term perspective and high degree of integration.

The Commission is proposing to explore the possibility of European Partnerships, as described in Annex 7. The list of candidates is already the result of extensive reform and rationalisation of the partnership landscape, yet it is open to co-design with the stakeholders through this co-design exercise.

ANNEXES - KEY STRATEGIC ORIENTATIONS

ANNEX 1 - HORIZON EUROPE CLUSTER 1 HEALTH

1. Global Challenges and Their Drivers

Diseases and disabilities pose a major socio-economic burden on citizens and health systems of the EU and worldwide. Non-communicable diseases, including mental disorders and illnesses, represent a major societal and economic burden and are currently responsible for up to 80% of health care costs in the EU¹. This will further increase should the ageing society² not adopt healthier lifestyles and more effective health care approaches. Likewise, infectious diseases, including antimicrobial resistant infections, represent a major health risk to people as well as a serious cross-border health security threat for countries in the EU and worldwide. These challenges call for more health promotion, better disease prevention and more effective solutions to manage diseases and reduce disease burden as well as health care systems throughout the EU that are reformed to become more accessible, sustainable, resilient and efficient in promoting and protecting everyone's health and delivering health care of high quality to all citizens. To that end, new approaches for integrated and person-centred health care are required, which take into account specific needs of citizens and population groups throughout the life course, the influence of environmental, behavioural and socio-economic risk factors on human health and well-being, the opportunities offered by new tools, technologies, and digital solutions, and are built on a competent, reliable, secure and competitive European system of health care service developers, suppliers and providers.

R&I will be instrumental to develop these new approaches as well as to increase the knowledge, understanding and know-how that underpin innovation for promoting health and for preventing, treating and curing diseases. It will also require that new, better and more cost-effective health care services supported by innovative tools, technologies, and digital solutions become available that respond to the health needs of citizens and populations for

¹ Non-communicable - or chronic - diseases are diseases of long duration and generally slow progression, and are the result of a combination of genetic, physiological, environmental and behaviours factors. The four main types of non-communicable diseases (NCDs) are cardiovascular diseases (like heart attacks and stroke), cancer, chronic respiratory diseases (such as chronic obstructed pulmonary disease and asthma) and diabetes. NCDs are by far the leading cause of death in the world, representing 63% of all annual deaths. NCDs kill more than 36 million people each year. Some 80% of all NCD deaths occur in low- and middle-income countries. <https://www.who.int/news-room/fact-sheets/detail/noncommunicable-diseases>

² The share of the population aged over 65 on average across EU countries has increased from less than 10% in 1960 to nearly 20% in 2015 and is projected to increase further to nearly 30% by 2060.

promoting and protecting their health, preventing and managing their diseases, and assisting them in pursuing a longer, independent and active life in a rapidly changing society. Unleashing the full potential of digital technologies and health data will be a strong driver to achieve this outcome. Cooperation with other sectors will maximise societal benefits, drive innovation and ensure optimal impact. Accordingly, R&I interventions under Cluster 1 Health will be oriented towards the following six health-related challenges:

- Staying healthy in a rapidly changing society;
- Living and working in a health-promoting environment;
- Tackling diseases and reducing disease burden;
- Ensuring access to sustainable and high-quality health care in the EU;
- Unlocking the full potential of new tools, technologies and digital solutions for a healthy society;
- Maintaining a sustainable and globally competitive health-related industry.

These challenges are complex and interdependent. They have been chosen because they address key concerns and provide a clear perspective on what benefits people, patients and populations as well as institutional, social and economic stakeholders in the EU can expect from R&I interventions supported under this cluster.

Staying healthy in a rapidly changing society

People's health and care needs are different, depending on their age, stage of life and social conditions.³ Their physical and mental health and well-being can be influenced by their individual situation as well as the broader societal context they are living in. Furthermore, health education and behaviour are important factors. Currently, more than 790'000 deaths per year are due to risk factors such as smoking, drinking, physical inactivity, and obesity.^{4,5} Income, education levels, social and gender aspects also have an impact on health risks and how disease can be prevented. Moreover, people's health can be impacted by a rapidly changing society, making it challenging to keep pace and find its way through new technological tools and societal changes, which both are increasing demands on the individual's resilience. In order to leave no one behind, to reduce health inequalities and to support healthy and active lives for all, it is crucial to provide suitable and tailor-made solutions, including for people with specific needs.

Living and working in a health-promoting environment

The environment we live and work in has direct beneficial or negative impacts on human health and well-being. It is a major determinant of health, estimated to account for almost 20% of all deaths in Europe.⁶ The factors causing these impacts on both physical and mental health are not all identified nor their effects comprehensively understood and accounted for in

³ For instance, the number of Europeans over 65 with age-related impairments is expected to grow from 68 million in 2005 to 84 million in 2020. It calls for new and tailor-made innovations that support the elderly in managing their impairment in daily life up to re-establishing body functions and capabilities.

⁴ Health at a glance Europe 2018 (OECD, European Commission)

⁵ A growing health threat for children and adolescents is overweight and obesity due to raising physical inactivity combined with unhealthy eating habits. Over 60% of children who are overweight before puberty will be overweight in early adulthood. Childhood obesity potentiates the risk for developing cardiovascular disease, type 2 diabetes, physical disabilities, orthopaedic and psychological problems, and underachievement in school. Obesity is one of the greatest public health challenges of the 21st century whose prevalence has tripled in many EU countries since the 1980s.

⁶ WHO Europe: Environment and Health at <http://www.euro.who.int/en/health-topics/environment-and-health>

decision-making.⁷ There are still considerable knowledge gaps in the understanding of the environmental, occupational and socio-economic risk factors for health and well-being. These risk factors include pollution, chemicals, noise, radiation, urbanisation, climate change, social injustice, changing work environments, and behaviour. Moreover, the determinants of a health-promoting environment need further understanding and evidence.

Tackling diseases and reducing disease burden

Communicable and non-communicable diseases cause the greatest amounts of premature death and disability in the EU and worldwide. They pose a major health, societal and economic threat and burden for people. Many people are still dying prematurely and suffering from these diseases. Non-communicable diseases, including mental illnesses and neurodegenerative diseases, are responsible for up to 80% of EU health care costs.⁸ These costs are spent on the treatment of diseases that are, to a large extent, preventable. Furthermore, although there is a huge potential for prevention, only around 3% of the health care budgets are currently spent on preventive measures. Infectious diseases, including antimicrobial resistant (AMR) infections, remain a major threat to health in the EU and global health security. AMR deaths could exceed 10 million per year worldwide according to some predictions.⁹

Ensuring access to innovative, sustainable and high-quality health care in the EU

Health care systems in the EU are committed to provide people with universal access to good quality health care financed on the basis of equity and solidarity. They can contribute to economic prosperity and social cohesion in the EU. It is a main priority for the EU to support Member States in ensuring that health care systems are effective, efficient, equitable, accessible, and resilient while remaining fiscally sustainable in the medium and long term. With a view to this, the role and organisation of health care systems needs to be adapted and reformed to cope with societal trends and changes that include demographic, epidemiological, technological and environmental transitions.

Unlocking the full potential of new tools, technologies and digital solutions for a healthy society

Technology is a key driver for innovation in the health and care sector. It can provide better and more cost-efficient solutions with high impact and can be tailored to the specific health and care needs of patients for improving their quality of life. However, novel therapies, technologies and approaches face specific barriers and hurdles in implementation and scale-up before reaching health care systems and patients, including societal issues. In addition, several emerging disruptive technologies and the availability of vast amounts of data and

⁷ Annually more than 400'000 premature deaths in the EU are caused by outdoor air pollution, mostly due to chronic diseases (with heart and lung being most affected) and respiratory infections. The heat wave that swept across Europe in 2003 resulted in 70'000 premature deaths. WHO estimated that the disease burden preventable through sound management of chemicals in the environment to around 1.6 million lives per year. Between 2030 and 2050, climate change is expected to cause worldwide approximately 250'000 additional deaths per year, from malnutrition, malaria, diarrhoea and heat stress.

⁸ Currently, around 50 million people in the EU are estimated to suffer from two or more chronic conditions, and most of these people are over 65. Every day, 22'500 people die in Europe from those diseases, counting of 87% of all deaths. They account for 550'000 premature deaths of people of working age with an estimated €115 billion economic loss per year (0.8% of GDP).

⁹ AMR is estimated to be responsible for 25,000 deaths per year in the EU alone and 700,000 deaths per year globally. It has been estimated that AMR might cause more deaths than cancer by 2050.

digitalisation offer big opportunities for transforming health and care and promoting health and well-being of citizens. Unlocking these opportunities depends on the capacity to collect, combine and make sense out of vast amounts of data, on the availability of appropriate regulatory frameworks and data infrastructures that will both safeguard the rights of the individual and of society, and stimulate innovation to develop impactful solutions. Due consideration of aspects of safety, effectiveness, appropriateness, accessibility, comparative value-added and fiscal sustainability as well as issues of ethical and legal nature will be crucial in order to translate these innovations into health policies, health and care systems, and clinical practice.

Maintaining an innovative, sustainable and globally competitive health industry

The health industry is a key driver for growth and contributes to employment through high-value jobs and a positive trade balance, and has the capacity to provide health technologies¹⁰ to the benefit of patients and providers of health and care services in Europe and worldwide. The development of novel health technologies is associated with high risks as it embraces the highest level of engineering combined with the complexity of life sciences. In addition, the health sector is strongly regulated, and many novel health technologies feature very long development times. Health industries, and in particular small and medium-sized enterprises (SMEs), may encounter difficulties to access the necessary investments, new markets and value-chains, or in setting-up partnerships and create alliances. Because health innovation impact healthcare, patients and society, the relevant value chains involve a broader variety of key players from supply, demand and regulatory side. A comprehensive approach relies therefore on cooperation and capacity building within a value ecosystem.

2. EU Policy Objectives

The *health and well-being of its people* is a central aim of the European Union, its policies and programmes. According to Article 168 of the Treaty on the Functioning of the EU, high level of human health protection shall be ensured in the definition and implementation of all Union policies and activities. With the proclamation of the European Pillar of Social Rights, the EU set the direction towards a fairer, inclusive and more social Europe for all European citizens based on a European social model that is fit for the challenges of the 21st century. Providing timely access to affordable, preventive and curative health care of good quality to everyone is amongst the key aspirations the EU and its Member States are aiming for, supported by dedicated regulations, policy strategies and programmes.¹¹

¹⁰ WHO definition of 'health technology': A health technology is the application of organized knowledge and skills in the form of devices, medicines, vaccines, procedures and systems developed to solve a health problem and improve quality of lives.

¹¹ For instance: Directive on patients' rights in cross-border healthcare; political declaration on prevention & control of non-communicable diseases; EU decision on serious cross-border threats to health; Commission Communication on effective, accessible and resilient health systems; Commission Communication on upgrading the single market (and its proposed health technology assessments initiative); Council conclusions on nutrition and physical activity; Council conclusion on personalised medicine and pharmaceuticals; Council conclusions on strengthening the balance in the pharmaceutical systems in the EU and its Member States; EU One Health Action Plan against Antimicrobial Resistance; Ostrava Declaration on Environment and Health; Commission Communication on the digital transformation of health and care; Council recommendation on strengthened cooperation against vaccine preventable diseases; Commission Communication 'European Plastics Strategy for a Circular Economy, Commission Communication 'Towards a Comprehensive European Union Framework on Endocrine Disruptors'; Commission Communication 'European Union Strategic Approach to

The EU is strongly committed to the UN Sustainable Development Goals (SDGs), many of which have an important impact on health and well-being, notably SDG 3 (Good Health and Well-being for People) with its nine health-specific targets aiming for universal health coverage for all at all ages by 2030, leaving no one behind, and ending preventable deaths. EU health-related actions aim to complement national health policies and thus support EU Member States in reaching those ambitious goals, which will not be possible without a massive investment in R&I at the national, European and international level.

3. Targeted Impacts

R&I supported under Cluster 1 aims to advance knowledge, build capacities as well as design, develop and demonstrate innovative solutions that will improve the health and well-being of people and support the transformation of health care systems. However, it will also depend on the actors on the ground – those receiving, supporting and delivering health and care services in local communities, regions and countries – to accept, support, take-up, scale-up and implement the recommendations and innovative solutions developed through R&I to achieve desired impacts. To maximise the benefits of EU investments and support the EU in achieving its goals, the cluster health will promote and unleash synergies with public health policies at national and regional level, with other EU programmes and policies, as well as with health-related European infrastructures. R&I activities under this Cluster shall target and contribute to the following interlinked, long-term impacts:

3.1 Staying healthy in a rapidly changing society

R&I aims at supporting citizens in pursuing healthy and active lives by providing suitable and tailor-made solutions, including for people with specific needs. Targeted impacts are:

1. Pregnancy and birth is safer, maternal mortality is reduced¹², preventable deaths of newborns and children under 5 years of age¹³ are suppressed, and the physical and mental health and well-being of children (and their families) is improved.^{14,15,16}
2. Citizens adopt healthier lifestyles and behaviours, make healthier choices (such as healthier food choices) and maintain longer a healthy, independent and active life with a reduced disease burden, including at old ages or in other vulnerable stages of life. They are able and empowered to manage better their own physical and mental health and well-being, monitor their health, and interact with their doctors and health care providers.¹⁷
3. Citizens' trust in knowledge-based health interventions and in guidance from health authorities is strengthened, including through improved health literacy, resulting in increased engagement in and adherence to effective strategies for health promotion,

Pharmaceuticals in the Environment'; EU decision on a General Union Environment Action Programme to 2020 'Living well, within the limits of our planet'

¹² SDG3 target 3.1, 3.2, 3.7

¹³ SDG 3 target 3.2

¹⁴SDG 3 targets 3.3,3.4 , 3.5, 3.7, 3.8 and 3a. WHO Framework Convention on Tobacco Control, the Tobacco Products Directive 2014/40/EU, WHO Europe Health 2020 A European policy framework and strategy for the 21st century

¹⁵ EU Action Plan on Childhood Obesity 2014-2020,

¹⁶ WHO Global action plan for the prevention and control of non-communicable diseases 2013-2020

¹⁷ Commission Communication on the digital transformation of health and care.

diseases prevention and treatment, including increased vaccination rates¹⁸ and patient safety.

4. Citizens are protected from health risks due to misinformation¹⁹, manipulation and fraud, including the sale, purchase and use of substandard, falsified²⁰ or inappropriate medicines.
5. Health policies and actions for health promotion and disease prevention are knowledge-based and targeted to citizens' needs.

3.2 Living and working in a health-promoting environment

R&I aims at protecting citizens' health from negative impacts resulting from environmental and occupational risk factors. Targeted impacts are:

1. Citizens' health and well-being is protected and promoted, and premature deaths, diseases and inequalities related to environmental pollution and degradation are prevented.^{21,22} In particular, the health threat and burden resulting from hazardous chemicals and air, water and soil pollution and contamination is reduced, including at the workplace, such that the related number of deaths and illnesses is substantially reduced by 2030.²³
2. The EU's adaptive capacity and resilience to climate change-related health risks is strengthened.²⁴
3. European cities and regions are healthier, more inclusive, safer, resilient and sustainable.²⁵
4. Policy-makers and regulators are aware and better informed about environmental and occupational risk factors, including the combination of factors, for health and well-being across society.²⁶ Accordingly, knowledge-based policies at EU and global level better protect and promote citizens' health and well-being.²⁷
5. Citizens understand better complex environment and health issues, and effective measures to address them and support related policies and regulations.²⁸

3.3 Tackling diseases and reducing disease burden

R&I aims at decreasing the burden of diseases on citizens and health care systems. Targeted impacts are:

1. Health burden of diseases in the EU and worldwide is reduced through effective disease management, including through the development and integration of innovative diagnostic

¹⁸ Council recommendation on strengthened cooperation against vaccine preventable diseases

¹⁹ Commission Communication on Tackling online disinformation – a European approach

²⁰ Directive on Falsified Medicines

²¹ Decision No 1386/2013/EU on a General Union Environment Action Programme to 2020 'Living well, within the limits of our planet', <http://ec.europa.eu/environment/action-programme/>

²² Ostrava Declaration of the Sixth Ministerial Conference on Environment and Health of the WHO Europe, 2017, http://www.euro.who.int/__data/assets/pdf_file/0007/341944/OstravaDeclaration_SIGNED.pdf?ua=1

²³ SDG 3 target 3.9

²⁴ Ostrava Declaration of the Sixth Ministerial Conference on Environment and Health of the WHO Europe, 2017, http://www.euro.who.int/__data/assets/pdf_file/0007/341944/OstravaDeclaration_SIGNED.pdf?ua=1

²⁵ Ostrava Declaration of the Sixth Ministerial Conference on Environment and Health of the WHO Europe, 2017, http://www.euro.who.int/__data/assets/pdf_file/0007/341944/OstravaDeclaration_SIGNED.pdf?ua=1

²⁶ Ostrava Declaration of the Sixth Ministerial Conference on Environment and Health of the WHO Europe, 2017, http://www.euro.who.int/__data/assets/pdf_file/0007/341944/OstravaDeclaration_SIGNED.pdf?ua=1

²⁷ E.g. the EU's future 8th Environment Action Programme, follow-up to its Plastics Strategy and the Strategic Approach to Pharmaceuticals in the Environment, and the WHO environment and health process.

²⁸ Ostrava Declaration of the Sixth Ministerial Conference on Environment and Health of the WHO Europe, 2017, http://www.euro.who.int/__data/assets/pdf_file/0007/341944/OstravaDeclaration_SIGNED.pdf?ua=1

and therapeutic approaches, personalised medicine approaches, digital and other people-centred solutions for health and care. In particular, patients are diagnosed early and receive effective and cost-efficient treatment, including patients with a rare disease, due to effective translation of research results into new diagnostic tools and therapies.

2. Premature mortality from non-communicable diseases is reduced by one third (by 2030), mental health and well-being is promoted, and the voluntary targets of the WHO Global Action Plan for the Prevention and Control of NCDs 2013-2020 are attained (by 2025), with an immediate impact on the related disease burden (DALYs).^{29,30}
3. Health care systems benefit from strengthened R&I expertise, human capacities and know-how for combatting communicable and non-communicable diseases, including through international cooperation. In particular, they are better prepared to respond rapidly and effectively to health emergencies and are able to prevent and manage communicable diseases transmissions epidemics, including within healthcare settings.
4. Citizens benefit from reduced (cross-border) health threat of epidemics and AMR pathogens, in the EU and worldwide.^{31,32} In particular, the epidemics of AIDS, tuberculosis, malaria and neglected tropical diseases are contained and hepatitis, water-borne diseases and other communicable diseases are being combated.³³
5. Patients and citizens are knowledgeable of disease threats, involved and empowered to make and shape decisions for their health, and better adhere to knowledge-based disease management strategies and policies (especially for controlling outbreaks and emergencies).
6. The EU benefits from high visibility, leadership and standing in international fora on global health and global health security, especially in partnership with Africa.

3.4 Ensuring access to innovative, sustainable and high-quality health care in the EU

R&I aims at supporting health care systems in their transformation to ensure fair access to sustainable health care services of high quality for all citizens. Targeted impacts are:

1. Health and social care services and systems have improved governance and are more effective, efficient, accessible, resilient, trusted and sustainable both fiscally and environmentally, with health promotion and disease prevention at their heart, by shifting from hospital-centred to community-based, people-centred and integrated health care structures and successfully embedding technological innovations that meet public health needs.
2. Health care providers are trained and equipped with the skills and competences suited for the future needs of health care systems that are reformed, digitally transformed and equipped with innovative tools, technologies and digital solutions for health and care. They save time and resources by integrating and applying innovative technologies, which better involve patients in their own care, by reorganising workflows and redistributing

²⁹ WHO Global Action Plan for the Prevention and Control of NCDs 2013-2020 (resolution WHA66.10). https://www.who.int/nmh/events/ncd_action_plan/en/

³⁰ Including for instance the following voluntary targets (against the 2010 baseline): A 25% relative reduction in the overall mortality from cardiovascular diseases, cancer, diabetes, or chronic respiratory diseases; Halt the rise in diabetes and obesity; An 80% availability of the affordable basic technologies and essential medicines, including generics, required to treat major non-communicable diseases in both public and private facilities.

³¹ WHO global action plan on antimicrobial resistance, 2015.

³² EU One Health Action Plan against AMR, 2017.

³³ SDG 3 target 3.3

tasks and responsibilities throughout the health care system, and by monitoring and analysing corresponding health and care activities.

3. Citizens play a key role in managing their own health and care, informal carers (i.e. unpaid carers) are fully supported (e.g. by preventing overburdening and economic stress) and specific needs of more vulnerable groups are recognised and addressed. They benefit from improved access to health care services, including financial risk protection, timely access to quality essential health care services, including safe, effective, and affordable essential medicines and vaccines.³⁴
4. Health policy and systems adopt a societal approach for the evaluation of health interventions, the organisation of health and care, and decision-making.

3.5 Unlocking the full potential of new tools, technologies and digital solutions for a healthy society

R&I aims at supporting the integration and deployment of innovation in health care systems. Targeted impacts are:

1. Europe's scientific and technological expertise and know-how, its capabilities for innovation in new tools, technologies and digital solutions, and its ability to take-up, scale-up and integrate innovation in health and care is world-class.
2. Researchers, innovators and health care providers use health data and Artificial Intelligence (AI) supported decision-making in a secure and ethical manner, respecting individual integrity and underpinned with public trust.
3. Better informed policies and tailored legal and ethical frameworks for the development of innovative health technologies, and better understanding of the societal impacts of innovative health technologies and the digital transformation of health and care.
4. Citizens benefit from targeted and faster research resulting in safer, more efficient and cost-effective tools, technologies and digital solutions for improved disease prevention, diagnosis, treatment and monitoring for better patient outcome and well-being, in particular through increasingly shared health resources (interoperable data, infrastructure, expertise).³⁵ Citizens trust and support the opportunities offered by innovation for health and care, are involved in their design and take part in informed decision-making, based on expected health outcomes and potential risks involved.

3.6 Maintaining an innovative, sustainable and globally competitive health industry

R&I aims at supporting the health industry in the development of novel health technologies addressing public health needs and market opportunities. Targeted impacts are:

1. Health industry in the EU is more competitive, sustainable and growing, providing high-value jobs and contributing to economic growth, in particular SMEs, by tapping into new markets and providing European leadership in breakthrough health technologies and innovations.
2. Health industry in the EU, in particular SMEs, gain the ability to grow and reach a critical mass to develop innovative products and services and to tap into international value chains and international markets.

³⁴ [SDG 3 target 3.8](#)

³⁵ Commission Communication on the digital transformation of health and care.

3. Citizens, health care providers and health systems benefit from a swift uptake of innovative health technologies and services offering significant improvements in health outcomes, while health industry in the EU benefit from decreased time-to-market.
4. Health industry is working more efficiently along the value chain from the identification of needs to the scale-up and take-up of solutions at national, regional or local level, including through early engagement with patients, health care providers, health authorities and regulators.
5. Health security in the EU benefits from reliable access to key manufacturing capacity, including timely provision of essential medical supplies of particularly complex supply and distribution chain.

4. Key R&I Orientations

R&I supported under Cluster 1 *Health* should mobilise researchers from academic institutions, research organisations, small and medium enterprises, and large companies, as well as citizens and patients, patients associations, providers of health and care services and regulatory instances, in order to tackle the six health-related challenges and deliver on the targeted impacts. Moreover, pan-European research infrastructures³⁶ will be harnessed, including those identified by the European Strategy Forum for Research Infrastructures (ESFRI) and those established under the European Research Infrastructures Consortium (ERIC) regulation³⁷, to strengthen the productivity of European health R&I and to support the development of effective, fiscally and environmentally sustainable solutions while promoting access to health innovation. In order to achieve the greatest impact and benefits for the health and well-being of its population, it is also essential that the EU continues its international efforts in cross-border cooperation, coordination and alignment. This includes major international initiatives and established multilateral networks, e.g., in the area of infectious diseases, non-communicable diseases, rare diseases, brain research, and -omics and environment and health. International cooperation and partnerships with third countries and other international partners are key for tapping the best expertise and know-how available worldwide, for leveraging a critical scale of resources, and for tackling global societal challenges. Infectious diseases outbreaks and the spread of antimicrobial resistance (AMR) do not follow geographical borders, environmental factors in an urban or rural context create similar exposure and experiences in different regions, and the burden of the ageing society as well as the challenges of treating health care data are not European challenges only. It will also be important that the cluster health can react swiftly and decisively to Public Health Emergencies of International Concern (PHEIC) declared by WHO and support urgently needed research. Seeking complementarities and synergies with the EU's external cooperation and trade policies will not only reinforce the links between research and implementation and support evidence-based policy-making but in particular amplify the uptake and deployment of R&I results and solutions and thus the impact of EU investments.

³⁶ <https://www.esfri.eu/>

³⁷ Such as : European Life-Science Infrastructure for Biological Information (ELIXIR) <https://elixir-europe.org/>, European Clinical Research Infrastructure Network (ECRIN) <https://www.ecrin.org/>; European infrastructure for translational medicine (EATRIS) <https://eatris.eu/>; Survey of Health, Ageing and Retirement in Europe (SHARE) <http://www.share-project.org/>; European research infrastructure for biobanking (BBMRI) <http://www.bbMRI-eric.eu/>; European Social Survey (ESS) <http://www.europeansocialsurvey.org/>.

The following sections focus on what R&I interventions and results are needed to tackle the health-related challenges and contribute to achieving the targeted impacts.

4.1 Staying healthy in a rapidly changing society

R&I can provide a better understanding of specific health and care needs throughout the life course, and develop more effective solutions for health promotion and disease prevention, including for needs related to chronic health conditions, physical and mental disabilities, or age-related impairments. R&I can help people, as well as communities, in developing innovative services, policies and digital solutions, also ensuring that they are accessible, equitable and effective in preventing disease and promoting health. Key to achieving these objectives is the availability and accessibility of real-world health data, which will require appropriate support by research and data infrastructures.

This R&I orientation will support activities aiming at:

1. Better understanding of human health at various developmental stages and their impact on ageing, including individual factors affecting health and individual resilience to diseases.
2. Better understanding of specific health and care needs and better solutions for addressing those needs, including specific needs of people in vulnerable stages of life, people with physical or mental impairments, or of population groups in socioeconomic situations with structural disadvantages.
3. Personalised solutions for health promotion and disease prevention of individuals or stratified solutions tailored to groups, including for improved prediction and prevention of diseases before/at birth.
4. Development of digital tools applications and other solutions, including social innovation, fostering health literacy and empowering citizens to better manage their own health and well-being throughout their life course and to protect them from health threats, including for countering health-related misinformation, manipulation and fraudulent sales of substandard, falsified or inappropriate medicines and illicit drugs.

Areas of Intervention:³⁸ This challenge requires R&I actions under several Areas of Intervention (AoI) of cluster 1 but the centre of gravity lies with AoI 1.2.1. ‘Health throughout the Life Course’. It is closely linked to AoI 1.2.2 ‘Environmental and Social Health Determinants’.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration. For example with cluster 2 ‘Culture, creativity and inclusive societies’ on health inequalities or cluster 6 ‘Food and natural resources’ on the role of nutrition for health (incl. human microbiome, mal- and over-nutrition, safe food), personalised diets (incl. food habits in general and childhood obesity in particular) and the impact of food-related environmental stressors on human health (incl. marketing). Other possible synergies could be explored by cooperating on digital tools, telemedicine or smart homes with cluster 4 ‘Digital, Industry and Space’ or with cluster 5 ‘Climate, Energy and Mobility’ on urban health or on mitigating the impact of road traffic accidents and related injuries.

³⁸ Areas of intervention are set in the proposed Specific Programme of Horizon Europe.

International cooperation: Similar health challenges and needs for health promotion and disease prevention are faced by other regions and countries. International cooperation should be sought and promoted in order to benefit from new knowledge and solutions as widely as possible.

4.2 Living and working in a health-promoting environment

R&I will produce the knowledge necessary to identify and assess the risks and benefits for health, and to enable health promoting and disease preventive policy actions. Results will support the EU's environment and health policies and overarching policy frameworks such as the future 8th Environment Action Programme, the EU Strategic Framework on Health and Safety at Work³⁹ and the European Environment and Health Process (EHP)⁴⁰. The outcome will also contribute to the development of new and improved health interventions and technologies. In order to achieve sustainable impacts, R&I must provide solid evidence and stimulate its uptake into a large number of environmental, occupational, social and health policies at the EU, national and regional level. Strong collaborations across sectors and with other Horizon Europe clusters dealing with issues such as agriculture, food, environment, climate, mobility or urban planning will be needed to ensure that maximal societal benefits will be reached. Likewise, international cooperation, including at science-policy level, will be key to drive forward and tackle this challenge.

This R&I orientation will support activities aiming at:

1. Collection, combination and analysis of environmental, occupational and human health-related data, taking advantage of the exposome⁴¹ approach.
2. Identification and characterisations of emerging and persistent environmental, occupational and climate change-related stressors.
3. Establishment and quantification of causal relationships between exposure to the identified stressors and health impacts.
4. Development of innovative methods to better estimate the economic and health costs of exposure to identified stressors and co-benefits of preventive actions across sectors.
5. Translation of research results into early warnings and evidence for regulatory preparedness, targeted at policy levels where action is needed.
6. Elaboration of cross-sectoral approaches to mitigate and prevent adverse health outcomes and promote beneficial health impacts, together with actors inside and outside the health area.

Areas of Intervention:⁴² This challenge involves R&I actions under several Areas of Intervention (AoI) of cluster 1 and other clusters, but the centre of gravity lies with AoI 1.2.2. 'Environmental and Social Health Determinants'. It is closely linked to AoI 1.2.1 'Health throughout the Life Course'.

³⁹ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0332>

⁴⁰ http://www.euro.who.int/__data/assets/pdf_file/0009/341946/Annex2_20June.pdf?ua=1

⁴¹ The concept of the exposome refers to the totality of environmental exposures (diet, lifestyle, occupational and environmental factors) from conception onwards, including its external and internal components.

⁴² Areas of intervention are set in the proposed Specific Programme of Horizon Europe.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration, for example with cluster 6 ‘Food and natural resources, agriculture and the environment’ on human biomonitoring, on healthy ecosystems and human habitats (incl. nature-based solutions health and well-being), or on the sustainable management of clean water, soil and air. Other possible synergies could be explored by cooperating with cluster 4 ‘Digital, Industry and Space’ on health-related space R&I for location-based services, geo-observation and monitoring (e.g. of pollution), with cluster 5 ‘Climate, Energy and Mobility’ on the surveillance, prediction and mitigation of the health impact of climate change or on concepts/technologies for smart and healthy homes, rural areas and cities, and with both cluster 4 and 5 on health impact assessment, e.g. the impacts on health and well-being of infrastructure, urban planning, transport or technologies.

International cooperation: Exposures to environmental stressors of relevance to human health are not confined locally but transcend national borders and are connected to global political and economic relationships and interactions. International cooperation is thus key to tackle this challenge effectively, including by cooperating with international actors and initiatives like the WHO and the WHO Europe environment and health process (incl. WHO European Centre for Environment and Health, Chemical Risk Assessment Network, Global EMF project); United Nations Environment Programme; US National Institute for Environmental Health Sciences; US CDC (NHANES biomonitoring programme); US Environmental Protection Agency; OECD (chemicals testing).

European Partnerships:

A partnership on chemicals risk assessment would be launched in 2022 to support the EU/national chemical risk assessment and management authorities by providing new evidence and methodologies and stimulate their uptake in regulatory processes. The joint research and innovation programme would address established chemical regulatory processes and facilitate their adaptation to and preparedness for persistent or emerging challenges. It would aim to strengthen European capacities in the areas of: human biomonitoring; environmental and food monitoring; toxicology and hazard assessments; exposure assessment; emerging chemicals; chemical mixtures; validation, standardisation and reference materials; risk assessment methodologies; data management and analysis; communication, dissemination and training; priority setting and sustainability. The partnership would not replace already existing mandatory reporting or monitoring schemes enshrined in EU regulations, but enrich them with new knowledge and tools where necessary. The partnership would contribute to the sustainability of the human biomonitoring platform developed by HBM4EU (2017-2021), by incorporating it into a wider chemical risk assessment initiative as recommended during the 2018 Human Biomonitoring conference. In fine, the partnership would provide an EU-wide research platform complementing the EU chemical regulatory system, thereby strengthening the EU-MS collaborations for chemical risk assessment and management.

4.3 Tackling diseases and reducing disease burden

There is an urgent need for R&I on new prevention, diagnostics, vaccines, therapies, alternatives to antibiotics, as well as to improve existing prevention strategies to create tangible impacts. This will require international cooperation to pool the best expertise and know-how available worldwide, to access world-class research infrastructures and to leverage critical scales of investments on priority needs through better alignment with other funders of international health R&I cooperation. The continuation of international partnerships and

cooperation with international organisations is particularly needed to combat infectious diseases, including antimicrobial resistances, and respond to major unmet needs for global health security including the global burden of non-communicable diseases.

This R&I orientation will support activities aiming at:

1. Better understanding of diseases and their drivers, including the causative links between environmental and behavioural factors and diseases, and better evidence-base for policy-making.
2. Better methodologies and diagnostics that allow timely and accurate diagnosis, identification of personalised treatment options and assessment of health outcomes, including for patients with a rare disease.
3. Development and validation of effective intervention for better surveillance, prevention, detection, treatment and crisis management of infectious disease threats.
4. Innovative health technologies developed and tested in clinical practice, including personalised medicine approaches and use of digital tools to optimise clinical workflows.
5. New and advanced therapies for non-communicable diseases, including rare diseases developed in particular for those without approved options, supported by strategies to make them affordable for the public payer.
6. Scientific evidence for improved/tailored policies and legal frameworks and to inform major policy initiatives at global level (e.g. WHO Framework Convention on Tobacco Control; UNEA Pollution Implementation Plan).

Areas of Intervention:⁴³ This challenge requires R&I actions under several Areas of Intervention (AoI) in cluster 1 but the centre of gravity lies with AoIs 1.2.3. ‘Non-Communicable and Rare Diseases’ and 1.2.4. ‘Infectious Diseases’. It is closely linked to AoI 1.2.2 ‘Environmental and Social Health Determinants’.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration, for example with cluster 3 “Civil security for society” on health security/emergencies (preparedness and response, medical counter measures, epidemic outbreaks/pandemics, natural disasters and technological incidents, bioterrorism), or with cluster 4 “Digital, Industry and Space” on decision-support systems or on geo-observation and monitoring (e.g. of disease vectors, epidemics). Other possible synergies could be explored by cooperating with cluster 6 “Food, bioeconomy, natural resources, agriculture and environment” on health security and AMR (one-health: human/animal/plant health).

International cooperation: Effective international cooperation is essential to reduce disease burden and to protect people against cross-border health threats including the rise and spread of AMR and (re)emerging epidemics. The EU should continue its efforts to initiate and participate in cross-border coordination and integration of R&I. To address these challenges of global dimension, it will require international cooperation to pool the best expertise and know-how available worldwide, and enable a better alignment with actions in the rest of the world. This includes international collaboration with major EU and global initiatives in the area of infectious diseases (Global Research Collaboration for Infectious Disease

⁴³ Areas of intervention are set in the proposed Specific Programme of Horizon Europe.

Preparedness, GloPID-R), non-communicable diseases (Global Alliance for Chronic Diseases, GACD), rare diseases (International Rare Diseases Research Consortium, IRDiRC), brain research (International Traumatic Brain Injury Research, InTbIR), personalised medicine (International Consortium for Personalised Medicine, ICPerMed), and -omics (e.g. the International Human Epigenome Consortium, IHEC, the 1 Million Genomes Initiative).

European Partnerships:

i) *“EU-Africa global health partnership to tackle infectious diseases”*: This R&I partnership would aim to increase global health security in sub-Saharan Africa (SSA) and Europe, by accelerating the clinical development of effective, safe, accessible, suitable and affordable health technologies as well as health systems interventions for infectious diseases in partnership with Africa and international funders. It will also support implementation research and health systems research for the uptake of new, improved or existing medical interventions. This partnership would be the successor initiative of the EDCTP2 partnership programme and be launched in 2021. It would be established as an institutionalised partnership based on Article 185/187 TFEU.

ii) *“Rare Diseases”*: This R&I partnership would aim to improve the lives of rare diseases patients. It would build on the results and experiences the ERA-Net E-Rare which was continued in the frame of the European Joint Programme on Rare Diseases (EJP RD). The EJP RD has been launched in December 2018 to further help in coordinating the research efforts of European, Associated and non-European countries in the field of rare diseases and implement the objectives of the International Rare Disease Research Consortium (IRDiRC). The proposed R&I partnership would be established as co-funded partnership programme, starting in 2024. iii) *“Translational health research”*: Several existing Horizon2020-funded partnerships involve the very same health R&I funders but are simply focused on different thematic priority areas. The proposed R&I partnerships would aim to establish a flexible and more effective coordination between programme owners (typically ministries) and programme funders (typically funding agencies) of the numerous networks established in the European Research Area (ERA) for Health and Well-being. It would focus on establishing a strategic research agenda and joint funding strategy between major European funders, public and private, on translational health R&I. and be established as a co-funded partnership , starting in 2023/2024.

Missions: The co-legislators requested a mission in the area of cancer. A mission board will advise the Commission on the specific scope and objectives of such a mission.

4.4 Ensuring access to innovative, sustainable and high-quality health care in the EU

R&I can help by supporting the development of innovative solutions for health care systems in all their various dimensions (e.g. governance, financing, generation of human and physical resources, health service provision, patient empowerment). In addition, R&I can provide decision-makers with new evidence, methods and tools to successfully implement those innovative solutions into their health care systems. It will in turn help to improve the governance of health care systems as well as to allocate resources according to people’s needs and preferences while delivering fiscal sustainability to make sure those needs can be met in the long-term.

This R&I orientation will support activities aiming at:

1. Innovative solutions to support reforms in health care systems (e.g. organisational models, innovative health service delivery models, integrated care models, long-term care; digitalised services, personalised approaches, financing models, including financing of health care systems, remuneration models, incentive mechanisms, new payment/reimbursement models of health technologies⁴⁴, accelerated access models in case of health emergencies; human resources planning, education and training).
2. Methods, tools and demonstrated pilots for uptake and scale-up of innovation in health systems (e.g. technological and organisational innovation), as well as for their transferability/adaptation from one country/region to another.
3. Simulation models to support policy-making, taking into account the complexity and specificities of health care systems and the need to protect access and pursue long-term fiscal sustainability.
4. Innovative solutions to support people-centred health and care throughout the life course: innovative solutions improving citizen empowerment, access of citizens to their own health data, health literacy, self-care, informal care, and community care.
5. Framework for better interoperability between data sources and infrastructures, for sharing, access, use and analysis of real-world data that will in turn improve the efficiency of health care systems by strengthening their governance, informing policy development and decision-making, facilitating monitoring and evaluation of health interventions with due attention to security, data protection, privacy, interoperability, standards, comparability and integrity.
6. Innovative full health technology assessment methods (i.e. including all relevant aspects such as clinical effectiveness, cost-effectiveness, ethics, organisational aspects, etc.) to support better allocation of resources, including reinvestment from low to high value care for patients.
7. Methods to assess performance and efficiency of healthcare organisations and health care systems based on outcomes that matter for patients and carers, aiming at reducing health inequality and allowing for international comparability.
8. Identification of factors accounting for health care systems resilience in absorbing the impact of crises, such as the expected dementia raise, and accommodating disruptive innovation.

Areas of Intervention:⁴⁵ All R&I areas of cluster 1 are concerned but the centre of gravity lies with AoI 1.2.6 ‘Health Care Systems’. It is closely linked to AoI 1.2.1 ‘Health throughout the Life Course’ as well as AoI 1.2.5. ‘Tools, Technologies and Digital Solutions for Health and Care’.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration, for example with cluster 3 “Civil security for society” on health economics and economic models, on cost-effectiveness, fiscal sustainability and accessibility of healthcare, or on adaptation of public health systems to societal challenges (climate change, migration, demographic change) thereby contributing to building resilience. Other

⁴⁴ WHO definition of ‘health technology’: A health technology is the application of organized knowledge and skills in the form of devices, medicines, vaccines, procedures and systems developed to solve a health problem and improve quality of lives.

⁴⁵ Areas of intervention are set in the proposed Specific Programme of Horizon Europe.

possible synergies could be explored by cooperating with cluster 4 “Digital, Industry and Space” on cybersecurity of (public) health systems, products and infrastructures of digitalised health and care, or on health impact assessment (e.g. related to consumer products, working place innovation).

International cooperation: Cross-border learning from practices and good models of care is key in this area of research. Research will benefit from cooperation with international actors: such as World Health Organization and public health institutes (e.g. Canadian institutes of health research and Agency for healthcare research and quality (AHRQ) in the United States that are already partners of EU-funded projects in health systems research).

European Partnerships:

i) “*Large-scale innovation and transformation of health systems in a digital and ageing society*”. This R&I partnership with health care systems owners/organisers and research funders aims at boosting research in policy, uptake and scale-up of innovations to accelerate transformation of national/regional health care systems. Specific objectives would be to provide evidence for innovative solutions that support cost-effective and fiscally sustainable health care policies, to build knowledge on the conditions for transferability and up-scaling of innovative solutions across and within EU countries, to develop and test a mechanism to support diffusion of innovative solutions, to define unmet needs of citizens and health and care systems and to establish an R&I platform that brings together health data across health care systems to enable data-driven policy. The partnership will built on the strategic research agenda developed by the Horizon2020-funded support action TO-REACH, will draw on the expertise and experiences from the Member States and network of regions involved in the European Innovation Partnership on Active and Healthy Ageing (EIP-AHA), the Second ‘Active and Assisted Living’ programme (AAL2), the InfAct Joint Action and work in synergy with the EIT KIC-Health. A strong synergistic link will be created with the European partnership on ‘Innovative Health Initiative’. It would be established as co-funded partnership and starting in 2021.

ii) “*Personalised Medicine*”: This R&I partnership would align priority setting and funding for research projects in the area of personalised medicine between the EU Member States and regions, associated countries and international partner countries. It would be the successor initiative of the Horzion2020-funded ERA-PerMed partnership and also build on the Horzion2020-funded actions in support of the International Consortium for Personalised Medicine (ICPerMed) led by several EU Member States. Based on the on the results and experiences with ERA-PerMed, the proposed HE partnership would continue to align national research strategies, promote R&I excellence, reinforce the competitiveness of European players in personalised medicine and enhance the European collaboration with non-EU countries, including by supporting collaborative innovative research projects through joint transnational calls for proposals. It would be established as co-funded or co-programmed partnership programme, starting in 2023.

Innovation Procurement: Innovation procurement is a mean to drive innovation from the demand side. Procurers (e.g. health care providers) are potential buyers of innovative solutions to public health interest needs that are not yet available, or in insufficient quantity, on the market. Innovation procurements can initiate innovation through the purchase of R&D services, when market solutions are missing, or boost the marketing of existing solutions for

early adopters. Innovation procurement can then open market opportunities for European companies, including SMEs.

4.5 Unlocking the full potential of new tools, technologies and digital solutions for a healthy society

R&I is needed on the large spectrum of tools and technologies for bio-medical research, prevention, diagnosis, therapy and monitoring. Managing benefits and risks of new technologies and due consideration of aspects of safety, effectiveness, inter-operability, appropriateness, accessibility, comparative value-added and fiscal sustainability and issues of ethical, societal and legal nature will be crucial in order to translate these innovations into health policies, health and care systems, and clinical practice responsibly. Moreover, cross-sectorial R&I could address specific unmet needs for health tools, technologies and digital solutions with limited commercial interest. Artificial Intelligence technologies have recently shown great promise for analysing high volumes of health data, with high potential for advancing biomedical research, personalised medicine and health care and for supporting health care systems in their clinical, organisational and logistical functions.

This R&I orientation will support activities aiming at:

1. New tools and technologies for biomedical research, prevention, diagnosis and therapy of diseases and tools for monitoring diseases as well as treatment progression are designed, developed, tested or validated for the benefit of patients and the health and care systems, including nanomedicines, advanced therapies, medical devices, digital solutions, Artificial Intelligence applications robotics, -omics and other data-driven interventions and procedures.
2. Health data accessibility and interoperability across the EU, including the free flow and secure exchange of health data, leaning on existing research infrastructures⁴⁶ as well as the creation of a European health cloud(s) for research purposes.
3. Improved risk-benefit ratio of the developed innovative tools, technologies and approaches owing to powerful digital solutions using and processing big data for better detection, diagnosis and monitoring of disease, including real-world data, for efficient value assessment.
4. Efficient up-scaling and production systems, including advanced manufacturing techniques, enabling targeted and personalized health interventions.
5. Improved health technologies and interventions based on digital solutions, which support timely health information and secure use of health data.
6. New data-driven approaches, computer models and -simulations and other digital solutions are developed, translated and optimised for the prevention, health care and person-centred care, including smart data infrastructures and AI-based data analytics.

Areas of Intervention:⁴⁷ This challenge will benefit from R&I actions under several Areas of Intervention (AoI) of cluster 1 but the centre of gravity lies with AoI 1.2.5 ‘Tools, Technologies and Digital Solutions for Health and Care’.

⁴⁶ Such as the European Life-Science Infrastructure for Biological Information (ELIXIR: <https://elixir-europe.org/>), identified by the European Strategy Forum for Research Infrastructures (ESFRI).

⁴⁷ Areas of intervention are set in the proposed Specific Programme of Horizon Europe.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration, in particular with cluster 4 “Digital, Industry and Space” on: digitalisation of the health sector, incl. health technologies, medical devices and key enabling technologies; assisted, autonomous, independent and empowered living; smart homes; decision support systems; health impact assessment (e.g. related to consumer products, working place innovation). Moreover, R&I actions under cluster health may be inspired by research achievements under pillar 1 (Open Science) or may benefit from follow-on support under pillar 3 (Open Innovation).

Innovation Procurement: Innovation procurement is a means to drive innovation from the demand side. Procurers are potential buyers of innovative solutions to public interest needs that are not yet available, or in insufficient quantity, on the market. Public procurements can initiate innovation through the purchase of R&D services, when market solutions are missing, or boost the marketing of existing solutions for early adopters. Innovation procurement can then open market opportunities for European companies, including SMEs.

4.6 Maintaining an innovative, sustainable and globally competitive health industry

There is a need for cross-sectorial R&I (integrating medical technologies, pharmaceuticals, biotechnologies, digital health and eHealth technologies) to strengthen the single market, including by implementing the Digital Single Market strategy, supporting the standardisation policy, driving innovation from the demand side and providing evidence and guidelines for stakeholders and regulators to ensure take-up of innovations supports fiscal sustainability while protecting access.

The health sector is subjected to strict regulatory requirements that impose the demonstration of clinical benefit(s) and safety. This means additional development steps, uncertainties and a longer time to market. Support to studies for health assessment procedures, clinical performance demonstration, quality assurance schemes and standardisation are therefore important elements.

This R&I orientation will support activities aiming at:

1. Efficient innovation management strategies, including intellectual property, to translate breakthrough technologies into health care applications.
2. Efficient collaboration with regulatory authorities and health care providers for an optimal time to patient access.
3. Novel methodologies and metrics adapted to new tools, technologies, digital solutions and interventions for their assessment, validation and translation into health care practice, including ethical aspects, their societal effects and integration into regulatory frameworks, and for allowing swift access by health care providers, patients and healthy citizens.
4. Regulatory authorities supported with better methodologies and interdisciplinary approaches to assess new health technologies and interventions.
5. New European standards and quality assurance schemes developed for submission to standardisation bodies and implementation by stakeholders.
6. Safe and clinically validated tools, technologies and services developed and delivered by European health industry that meet the needs of citizens, patients, health care providers and systems.
7. Greener pharmaceuticals and health technologies.

Areas of Intervention: All R&I areas of cluster 1 are concerned but the centre of gravity lies with AoI 1.2.5. ‘Tools, Technologies and Digital Solutions for Health and Care’, while it is closely linked to AoI 1.2.6 ‘Health Care Systems’.

Cross-cluster issues: Synergies with other clusters could be explored through broad cross-sectoral collaboration, in particular with cluster 4 “Digital, Industry and Space” on: industrial R&I infrastructures (pilot plants, testing and simulation facilities, open innovation hubs); additive manufacturing (3D/4D printing) and other production technologies (incl. biomanufacturing); safe, smart and sustainable materials. Synergies could also be explored with pillar 3 “Open Innovation”, in particular the scheme of the European Innovation Council that supports breakthrough and risky innovations.

European Partnerships: The “*Health Innovation partnership*” (*Innovative Health Initiative*) will provide a cross-sectoral collaborative platform bringing the pharmaceuticals, diagnostics, medical devices, imaging and digital industries together with public stakeholders. It will contribute significantly to “*Enabling the digital transformation of health and care in the Digital Single market*” by supporting precompetitive R&I in areas of unmet public health and accelerating the development of people-centred health care innovations that can be taken up in health and care systems. It intends to overcome barriers that prevent exploiting the full potential of digitalisation and data exchange, through standards, methods and tools for interconnectivity and interoperability as well as to deliver tools, data, platforms, technologies and processes that enable the delivery of innovative health products and services to predict, prevent, intercept, diagnose and manage diseases more efficiently, that meet the needs of the end users and payers. A strong synergistic link will be created with the European partnership on ‘Large-scale innovation and transformation of health systems in a digital and ageing society’, thereby warranting the usefulness, transferability and the potential uptake of the developed health solutions into public health systems. This partnership would be the successor initiative of the IMI2 partnership programme based on Article 187 TFEU. It will be launched in 2021.

Innovation Procurement: Innovation procurement is a mean to drive innovation from the demand side. Procurers are potential buyers of innovative solutions to public interest needs that are not yet available, or in insufficient quantity, on the market. Public procurements can initiate innovation through the purchase of R&D services, when market solutions are missing, or boost the marketing of existing solutions for early adopters. Innovation procurement can then open market opportunities for European companies, including SMEs.

5. European Partnerships

Partnerships provide mechanisms to consistently aggregate R&I efforts into more effective responses to the policy needs of the Union, developing close synergies with national and regional programmes, bringing together a broad range of actors to work towards a common goal, and turning R&I into socio-economic results. As such, they are powerful instruments to address global challenges by translating common priorities into concrete roadmaps and coordinated activities. EU-funded health R&I played a pioneering role in establishing and testing first approaches and forms of cooperation between public and private funders, both within Europe and at international level. Under the previous R&I programme, Horizon 2020 (2014-2020), 36% of the budget allocated to collaborative health R&I was invested through European health R&I partnerships (€2.680bn of €7.472bn).

For the requested rationalisation and reform of European partnerships under Horizon Europe, the following two considerations were taken into account under Cluster Health, mainly to increase the openness and reduce the number of partnerships:

1. Widening the scope and/or objectives of partnerships, e.g.
 - to facilitate the participation of low performing countries
 - to extend private sector participation and improve leverage of funding
 - to set the ground towards better uptake and systemic impact of related R&I
2. Discontinuation and merging partnerships
 - to simplify the funding landscape, improve coherence and increase transparency
 - to create (additional) economies of scale

Following these considerations, the following five co-funded European partnerships are proposed for the first four years of Horizon Europe:

1. “Large-scale innovation and transformation of health systems in a digital and ageing society” (as of 2021);
2. “Chemicals risk assessment” (as of 2022);
3. “Translational health research” (as of 2023/2024);
4. “Personalised Medicine” (as of 2023);
5. “Rare Diseases” (as of 2024).

In addition, two institutionalised European partnerships (based on Article 187) are proposed in the area “Faster development and safer use of health innovations for European patients, and global health” set by the legislator:

1. “EU-Africa research partnership on global health security to tackle infectious diseases” (as of 2021);
2. “Innovative Health Initiative” (as of 2021).

On the one hand, These partnerships provide significant leverage of investments and alignment on common priorities which allow sharing expertise, resources and the financial risks involved and thus achieving critical scales that a single member state or company would not be able achieve alone. On the other hand they allow raising awareness and attracting interest from policy-makers, stakeholders and the wider public as well as gaining support from additional partners. As opposed to regular calls for proposals, a European partnership can bring together a broader spectrum of stakeholders, both private and public, to align agendas across industrial sectors and/or public policies with a higher level of commitment and over a longer time-scale to implement activities needed for major changes and impacts. Regular calls for proposals will neither achieve the same level of coordination, alignment or integration nor allow the same level of sharing of resources, responsibilities and financial risks involved. This is particularly true in cases where the number of disease cases (individual patients) is low, such as for rare diseases, or in cases where the market prospects (return of investments) do not match the financial risks involved, such as for poverty-related and neglected infectious diseases. Moreover, maximizing the impact on the health and well-being of citizens, patients or health systems requires building a long-term strategy and annual programming for a wide range of activities including research, innovation, networking, training, demonstration and dissemination, which is not possible through traditional collaborative projects.

6. Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas:

- adaptation to climate change including societal transformation;
- cancer;
- healthy oceans, seas, coastal and inland waters;
- climate-neutral and smart cities;
- soil health and food.

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

ANNEX 2 - HORIZON EUROPE CLUSTER 2

CULTURE, CREATIVITY AND INCLUSIVE SOCIETY

1. Global Challenges and Their Drivers

The EU stands for a unique way of combining economic growth with high levels of social protection and inclusion, shared values including democracy, human rights, and the richness of diversity. This model is constantly evolving and needs to deal with the challenges from amongst other things, demographic change, globalisation and technological change.

Activities in Cluster Culture, Creativity and Inclusive Society focus on challenges pertaining to democratic governance, cultural heritage and the creative economy, social and economic transformations. The challenges are interconnected and have been chosen because they respond to the most pressing social, political, economic and cultural concerns and expectations of European citizens. They provide a clear picture of what benefits citizens and different stakeholders can expect from R&I actions supported under this cluster. The key R&I priorities will respond to the following challenges:

1) Enhancing democratic governance

Democracies are more fragile and more vulnerable than in the past. The Freedom in the World Report (2018) shows that democracy across the globe faces its most serious crisis in decades. At the same time, various European surveys show declining levels of trust to the political institutions of democracy. In terms of legitimacy, there are signs of a potential shift from governance based on expertise, multilateralism, and consensual policymaking towards majoritarianism, unilateralism, nationalism, and polarization. Relevant research can support policy action in favour of democracy, its stability, and its further development with a view to enhancing representation, participation, openness, pluralism, tolerance, the effectiveness of public policy, non-discrimination, the protection of fundamental rights and the rule of law⁴⁸.

2) Promoting Cultural Heritage

Cultural heritage is the expression of the ways of living a society has developed by common values, traditions and beliefs and the different influences it has been exposed to and absorbed over time. It gives a sense of belonging to people and anchors our societies into their past while allowing them to project themselves into the future. Opinion surveys show that cultural heritage is important for the overwhelming majority of European citizens, who also believe that public authorities should allocate more resources to its protection⁴⁹. The EU's "United in

⁴⁸ Merkel W. (2019) Past, present and future of Democracy: A Policy Review of Framework Programme Projects. DG RTD/EC.

⁴⁹ Special Eurobarometer 466 (2017) on cultural heritage;

Diversity” motto finds a tangible expression in cultural heritage. Historical sites and monuments, cultural landscapes, artefacts, museums, archives, as well as languages, customs, traditions, and values all make up the rich tapestry of European cultural heritage. This makes Europe a vibrant and unique place to tackle future challenges based on its creativity, excellent research, sustainable cultural tourism and cutting-edge technologies.

Cultural Heritage needs to make the best use of the opportunities brought by the digital transformation. It needs to combine traditional craftsmanship, cutting edge and digital technologies for the preservation and restoration of cultural goods with innovative techniques in the cultural and creative industries with a view to the creation of jobs, growth and wealth.

3) Management of social and economic transformations

Together with other challenges like climate change, the transition to a low carbon economy and demographic developments, technological advancements pose multidimensional social (economic, ethical, cultural and political) challenges. In the realm of work, productivity and welfare, as well as in the way we live and learn, the impact of automation could be substantial. A full deployment of existing new technologies in the production process could lead to automation rates of one third to two thirds of today's tasks.⁵⁰ According to other estimates, approximately 14% of jobs in the OECD countries are highly automatable, equivalent to 66 million jobs.⁵¹ At the same time, there has been an increase in income inequality and labour market polarisation, and a slowdown in convergence in income and employment in most European countries⁵². Inequalities threaten social and territorial cohesion and economic growth. They also create obstacles in participation in political life and can thus undermine the stability of democracies.

In recent years, Europe experienced the arrival of an increased number of migrants, including asylum seekers. Migration has become a crucial issue for Europe, one that is likely to dominate policy and political agendas for many years to come. Migration is a challenge requiring comprehensive and coordinated European responses, both inside and outside the EU, involving Member States, EU actors, as well as local and regional authorities, civil society organisations and economic and social partners. The task of research is to better understand migration in a global and EU context and assist in its governance and enhance integration. It can enhance policies by providing evidence on the causes and consequences of the phenomena and facilitate timely response by identifying trends and suggesting possible

Sonkoly, G. and Vahtikari, T. (2018) Innovation in Cultural Heritage Research: For an Integrated European Research Policy. DG RTD/EC.

⁵⁰ See in particular European Commission (2018), Employment and Social Developments in Europe (ESDE) Annual Review, “The new world of work: Beyond digitalisation”, July 2018, https://ec.europa.eu/commission/news/employment-and-social-developments-europe-2018-jul-13_en

⁵¹ Nedelkoska, L. and G. Quintini (2018), “Automation, skills use and training”, OECD Social, Employment and Migration Working Papers, No. 202, OECD Publishing, Paris.

⁵² Eurofound (2017), Income inequalities and employment patterns in Europe before and after the Great Recession, Publications Office of the European Union, Luxembourg.

Kvist, J. (2016) Fighting Poverty and Exclusion through Social Investment – A European Research Perspective. DG RTD/EC;

Allmendinger, J. (2015) An ever closer union among the peoples of Europe? - Rising inequalities in the EU and their social, economic and political impacts. DG RTD/EC.

policy solutions. Research should contribute to integration, through dispelling myths and biases⁵³.

2. EU Policy Objectives

Cluster 2 Culture, Creativity and Inclusive Society aims to foster greater understanding of a culturally and socially rich and diverse Europe and show how it can benefit most from adopting new paradigms, and policies for change in a context of fast paced transformations and international interconnectedness. Although the challenges are great, so too are the opportunities to turn these into strengths through European cohesion, convergence, diversity and creativity across all areas of the economy, society, culture and governance.

Thus, there is a need for research and innovation that increases our knowledge about the current developments of European societies and that directly develops solutions for the future. To promote new thinking and provide solutions to social and economic challenges, the cultural and creative sectors should be integrated in research and innovation processes. Approaches should be inter-disciplinary, inclusive, cross-sectorial, cross-national, and comparative allowing the identification of change factors while elaborating innovative theories, applications and policy recommendations for moving forward. In doing so, they should also make best use of the ongoing big data revolution in the social sciences and the humanities.

Cluster 2 will address EU priorities on Democratic Change; Jobs Transformation, Growth and Investment; Migration; Justice and Fundamental Rights; A Deeper and Fairer Internal Market; Making the EU a Stronger Global Actor; Cultural Heritage.

3. Targeted impacts

Delivering on Horizon Europe's impact pathways Cluster 2 Culture, Creativity and Inclusive Society strategic R&I activities will:

- Support policy action in favour of democracy, its stability, and its further development with a view to enhancing representation, participation, openness, pluralism, cultural participation, respect of diversity, non-discrimination, the protection of fundamental rights and the rule of law.
- Help tackle political extremism and polarisation and restore trust to governance.
- Help protect historical sites and monuments, cultural landscapes, artefacts, museums, archives, as well as languages, customs, traditions, and values
- Support EU migration and mobility policies, both internal and external.
- Help reverse social, economic, cultural and political inequalities and their causes and promote gender equality.
- Assess and respond to the social, ethical, political and economic impacts of drivers of change (technology, globalisation, and changing demographics) in the wide variety of social, economic and territorial contexts in Europe.
- Contribute to a comprehensive European strategy for inclusive growth and upward convergence in employment and social affairs.

⁵³ King, R. and Lulle, A. (2016) Research on Migration: Facing Realities and Maximising Opportunities. DG RTD;

- Create high quality new knowledge, foster its diffusion and improve its take up in policy making.

4. Key R&I Orientations

R&I activities in this Cluster will help develop social, political and economic analysis, evidence based policy recommendations, innovations and foresight in all (three) Key R&I Orientations outlined below. New statistical tools and methodologies will be also developed, more easily accessible and comparable at EU level and with a better granularity in terms of findings (with due focus to distribution and territorial impacts).

In this context the Cluster will:

- Build up evidence and policy recommendations on enhancing democracy and good governance;
- Elucidate the societal – including political, ethical, cultural, gender and economic - effects of technological advancements and the impact of drivers of change (such as globalisation, ageing etc.) on jobs, skills, education, productivity, income, welfare and inequalities.
- Develop evidence-based policy recommendations on how economic sectors, including the cultural and creative sectors and the social economy, can address social and economic transformations.
- Help develop evidence based policy responses for inclusive growth and upward socio-economic convergence. Buttress the EU’s resilience to economic, social, and financial shocks.
- Develop and test innovative approaches that address social challenges, including via experimentation, behavioural studies and social innovations.
- Contribute to the implementation of internationally agreed agendas (SDGs, decent work agenda, etc.) and the promotion of EU core values;
- Support the implementation of robust evidence-based strategies in the management of mobility and migration and the integration of migrants in European societies.
- Promote the value, monitoring, protection, access to and sustainable use of European cultural heritage and its contribution to the cultural and creative sectors.
 - Build evidence of the innovation capacity of cultural and creative industries and their role as innovation triggers in other economic sectors as well as other societal domains.

4.1. Democracy and Governance

The implementation of the research activities will assist in the re-invigoration and modernisation of democratic governance. The aim is to develop innovations, policies and institutions that expand political participation, social dialogue, civic engagement and gender equality. Activities will also enhance transparency, the effectiveness of public policy-making, accountability and legitimacy and will equally improve trust in democratic institutions, safeguard liberties and the rule of law, and protect democracy from multidimensional threats. Rich historical perspectives will set the frame for soundly understanding present developments and the help the mapping of future pathways. In the medium to long term, the knowledge, data, scientifically robust recommendations and innovations generated will enhance decision making on all aspects relevant to democratic governance:

- R&I will support and strengthen core democratic values. While enshrined in international, EU and national laws, pluralism, tolerance, non-discrimination, justice, solidarity, human dignity, are all concepts that require a deeper analysis of the dynamic meaning they have in our societies. This includes the analysis of the changing practices through which such meanings emerge and are sustained.
- Research will also serve to foster awareness and exercise of democratic rights and enhance active citizenship (including from the perspective of vulnerable and under-represented groups)⁵⁴. It will help restore trust in governance, close the gap between perceptions and reality, and respond to threats to the electoral process and democracy⁵⁵. Activities will empower citizens to manage better their personal data, including data created and/or accessed by public administrations.
- Knowledge generated should allow the formulation of policy recommendations in support of transparency, responsiveness, accountability, inclusiveness and effectiveness of democratic governance at all levels.
- Similarly, activities in the Cluster will feed into EU policies on the protection of fundamental rights and the application of the rule of law.
- R&I will help address the impacts and explore the potential of technological and scientific advancements, including big data, , online social networks and artificial intelligence on democracy. It will also aim to increase transparency and accountability of governments and lead to the development of strategies to counterbalance disinformation and the manipulated polarisation of public opinion.
- As such, it will also help assess the state of safeguards of democratic systems, analysing in this context the role of media, including digital media. Research will also help understand social network communication and build on education and media literacy as gateways to democratic participation. Knowledge generated will lead to policy recommendations regarding the role of digital technology in participatory democracy and active and inclusive citizenship.
- R&I will also target culture's value to democracy, by analysing relationships between a number of cultural and democratic dimensions such as active cultural engagement and democratic openness; political engagement; trust in society and well-being.
- R&I will investigate the ways public decisions are taken based upon the interplay of available information, the role of evaluations and experimentations and public perceptions.
- Finally, activities funded under this R&I priority will systematically analyse the impact of economic and socio-spatial inequalities on political representation and participation and explore ways to reverse negative trends.

⁵⁴ Ensure the equal enjoyment of all human rights and fundamental freedoms for persons with disabilities as per the UN Convention on the rights of persons with disabilities.

⁵⁵ Merkel W. (2019) Past, present and future of Democracy: A Policy Review of Framework Programme Projects. DG RTD/EC.

Kepel, G. and Rougier, B. (2016) Addressing terrorism: European Research in Social Sciences and the Humanities in Support to Policies for Inclusion and Security. DG RTD/EC;

4.2 Cultural Heritage

The implementation of these research activities will result in better access, understanding of and engagement with cultural heritage. They will support the emergence of a sense of belonging based on the common roots and riches of the diversity of European cultural heritage. R&I results will contribute to European integration by providing better, wider and more equal access to culture, cultural heritage and the arts. Knowledge generated will support the emergence of new forms of cultural expression, at the cross roads between different creative sectors. Horizon Europe activities will also enhance the governance of European cultural heritage institutions and networks. Most importantly, they will improve protection, enhancement, conservation and more efficient restoration of European cultural heritage. Research activities shall increase the quality standards for conservation and restoration of European cultural heritage. R&I will provide solutions for making the EU a world leader in cultural heritage conservation technologies, management, digitisation and curation of digital heritage assets. Supported activities will provide research and innovation for developing sustainable and inclusive cultural tourism in Europe. They will also increase capacities for the protection of endangered cultural heritage and deployment of preventive measures against the illicit trade in cultural goods. R&I will also help the preservation of endangered languages. Finally, R&I will support sustainable growth and job creation through contributing to a European industrial policy for cultural and creative industries including design.

- Support the EU's policy objective in monitoring, safeguarding and transmitting cultural heritage, fostering cultural and creative sectors and promoting cultural diversity.
- Share and boost access to and participation in cultural heritage through innovative approaches, new and emerging technologies, including digitisation and increased cultural literacy. Support the use of digitised historical collections and archives for ground-breaking new interpretations of the past.
- Build on the role of intangible heritage (e.g. crafts, festivals, music, dance etc.), traditions, values and identities and new forms of cultural expression in the development of new approaches for more cohesive, and sustainable societies.
- Promote new educational and training pathways and skills to make the existing cultural heritage protection practices compatible with societal transformation (data society).
- Promote policies and projects leading to ensuring gender equality in the cultural heritage sector.
- Investigate the social construction, usage (and reflexive character) of cultural heritage at the national, European and international levels.
- Develop cutting-edge conservation and restoration technologies and methods and provide innovative, integrated, sustainable and participative management models.
- Connect cultural heritage with the creative and cultural sectors, with a view to spurring inclusive growth, jobs, social cohesion and diversity.
- Break the boundaries between creativity, production, promotion and access to content, innovative business models and technological advances in the cultural and creative sectors and link analogue and digital heritage and intercultural cooperation.

- Research old and new forms of cultural and artistic expression to promote tangible and intangible heritage and intercultural cooperation and valorise traditional skills and reuse existing assets.
- Provide research capacities for European cultural diplomacy and for underpinning the European Union's leading role in international cooperation for preventing and fighting illicit trafficking in cultural goods and for the protection of endangered cultural heritage, also in conflict zones.
- Develop new approaches, concepts and practices for sustainable, accessible and inclusive tourism, including cultural tourism.
- R&I will contribute to sustainable development through research and innovation for the conservation, safeguarding, developing and regeneration of cultural landscapes.

4.3 Social and Economic Transformations

The implementation of these research activities will contribute to a comprehensive European strategy for inclusive growth, ensuring no one is left behind, including through the accumulation and preservation of human capital in the face of old and new risks. It will equally support productivity gains and social and economic resilience. Activities will support the governance of migration and the integration of migrants and populations of immigrant background. They will also contribute to EU migration and mobility policies, both internal and external. The overall knowledge generated will feed into the design of institutions in line with the above mentioned objectives and will facilitate the assessment of policy needs and outcomes in the field of the societal and economic transformations.

- Research will support policies for inclusive growth and upward convergence via a strategy of social and economic investments, structural reforms and productivity enhancing policies in line with the European Pillar of Social Rights and the EU's policies on smart, inclusive and sustainable growth.
- Research will also assess the role of specific sectors as relevant, including cultural and creative sectors and the social economy, for today's social and economic transformations.
- Similarly, activities will help reverse inequalities, develop human capital, increase equal opportunities and tackle social exclusion taking into account long-term trends and risks with a view to advancing the EU's employment, education and social inclusion policies. R&I will boost the EU's capacity to monitor perceptions of key socio-economic trends and better anticipate needs and developments. Such information is needed e.g. for strategies for inclusive education, training and lifelong learning for high value added skills, which can facilitate social mobility and economic growth.
- Another objective will be to assess the multidimensional impacts of globalisation, demographic changes and technology, including digitalisation and automation, on the future of work and skills needs, productivity, employment, taxation, welfare, social services and the public sector; in the wide variety of social, economic and territorial contexts in Europe.
- Gender equality in all social, political, economic and cultural domains shall be covered. Addressing intersections between gender and other social categories, such as disability, sexual orientation and ethnicity, will also be a focus.
- Equally, activities will facilitate the EU's response to new impacts of globalisation and economic competition with a view to fairness as well as economic and social sustainability

and resilience (integrating a territorial dimension). The goal will be to strengthen resilience through shock absorption mechanisms including at EU level via fiscal, monetary, social protection, labour market and macro prudential policies.

- Activities will bring the benefits of digital transformation to education and training, by making optimal use of emerging technologies (such as AI, data analytics or blockchain). They will support innovative learning environments and provide teachers and educators with the adequate skills, knowledge and awareness of opportunities.
- R&I will support the digital transformation and modernisation of public administrations and help them meet citizens' and other stakeholders' expectations regarding user-centric/personalised service provision, including where service provision is threatened by social or spatial challenges.
- Activities in this R&I orientation will also support EU migration and mobility policies. Research will focus on analysing past and current dynamics of migration and integration, future trends and projections, societal impacts of migration of refugees and other migrants, and the effects of migration policies. It will help understand and address drivers and transformations underlying migration. Activities will contribute to strengthening mobility and migration governance in Europe and globally, by improving the quality of the data landscape and evidence-based knowledge.

European Partnerships

A partnership approach is used in case it will more effectively achieve objectives and targeted impacts than regular calls for proposals of Horizon Europe. Thus, European Partnerships shall be established for addressing European or global challenges only in cases where they will more effectively achieve objectives of Horizon Europe than the Union alone and when compared to other forms of support of the Framework programme.

The following areas for future partnerships with a lead under this cluster have been identified:

- Linking the past to the future: cultural heritage and the cultural and creative sectors
- Social transformations and inequalities

Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas;

- adaptation to climate change including societal transformation
- cancer
- healthy oceans, seas, coastal and inland waters
- climate-neutral and smart cities
- soil health and food

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

ANNEX 3 - HORIZON EUROPE CLUSTER 3

CIVIL SECURITY FOR SOCIETY

1. Global Challenges and their Drivers

Security is one of the main concerns for the EU's citizens and is therefore among the top priorities for the Commission. While the threats of terrorism and crime against the EU remain serious, challenges like cyber-attacks are requiring coordinated responses and novel concepts. Illegal migration caused by ongoing insecurity and economic instability in the EU's neighbourhood as well as an increase of legal movements of persons and goods are requiring new technological solutions to allow for more efficient and better integrated border management. Disasters, whether natural or man-made, can put at risk important societal functions, such as health, energy supply and government. The aim is to prevent and reduce the loss of life, harm to health and the environment, economic and material damage from disasters, ensure food security as well as to improve the understanding and reduction of disaster risks and post-disaster lesson learning. Research can play an active role in this respect by supporting the development of innovative and collaborative solutions.

This cluster has as its vision to support wider EU responses to security challenges i.e. to support 'a resilient and more stable Europe that protects' as well as for this purpose supporting a competitive European civil security industry sector. It will address the challenges arising from persistent security threats like terrorism and crime, including cybercrime, as well as natural and man-made disasters.

As these challenges are rapidly evolving and technological progress is making a response increasingly complex, security research can serve as a tool to move from a reactive approach to security to a proactive approach based on foresight and anticipation. Among other, EU security research is a cornerstone of the Security Union enabling innovation in technologies and knowledge and furthermore contributes to a more competitive and, when necessary, autonomous European security industry. Research will enable opportunities that will be offered by emerging technologies such as e.g. Artificial Intelligence while at the same time preventing the malicious use of such same technologies.

2. EU Policy Objectives

This cluster will support implementation of EU policy priorities relating to security, including cybersecurity, and disaster risk management. In order to ensure a best possible impact, the activities under the cluster are aiming at supporting concrete EU policy as defined for each area of intervention:

- R&I activities in relation to disaster risk management will support implementation of the Union Civil Protection Mechanism, the EU Adaptation Strategy as well as of the Sendai Framework for Disaster Risk Reduction (2015-2030) and the Paris Agreement, and related international processes such as IPCC and IPBES. In relation to CBRN-E incidents, R&I will support implementation of the EU CBRN and Explosives Action Plans.
- As regards protection and security, R&I activities will support implementation of relevant EU policies including those developed under the framework of the European Agenda on Security and the development of a Security Union. These include policies on integrated

border management, the EU Action Plan on the protection of public spaces, policies and instruments on protecting critical infrastructure, as well as on fighting crime, including cybercrime and terrorism.

- R&I activities will help to put into practice the EU Maritime Security Strategy and, as concerns EU maritime borders, take in role in developing integrated border management.
- Cybersecurity, as addressed by the digital and privacy policy of the Union, in particular the NIS Directive, the GDPR, the EU Cybersecurity Act, and the future e-Privacy Regulation will benefit from R&I activities so as to keep up with rapid technological developments and the understanding of emerging trends in the cyber-domain.

As an overarching priority, effective support will be provided to practitioners, law enforcement agencies, first responders and other public authorities or private entities which are ensuring the security of European citizens, infrastructures and assets in general.

Alongside supporting EU policy responses to security challenges, R&I within this cluster will boost the competitiveness of companies and research organisations in the EU civil security sector and thereby strengthen the EU's technology and industrial base in this sector. By doing so, it will also support European strategic autonomy in critical security areas such as cybersecurity; cloud services; artificial intelligence; critical raw materials and components; EU space technologies, systems and the EU Space Programme and its components (e.g. Copernicus, Galileo and EGNOS, SSA and GOVSATCOM).

All these activities will help to achieve SDG 16 (peace, justice, rule of law) and other relevant SDGs.

3. Targeted impacts

The main impacts sought are to support implementation of EU policy priorities relating to security, including cybersecurity, and disaster risk management:

- improved disaster risk management and societal resilience, leading to reduced losses from man-made and natural disasters;
- improved management of air, land and sea EU external borders, leading to better monitoring of movements across external borders and reduction of illegal movements of people and goods across those borders;
- better protection of citizens from violent attacks in public spaces, through more effective prevention, preparedness and response while preserving the open nature of such spaces;
- improved security and resilience of infrastructure and vital societal functions, such as healthcare, law enforcement, energy, mobility, public services, financial services, communication and logistics infrastructures/networks, so as to minimise disruptions including from hybrid threats;
- improved maritime security, including from man-made and natural disasters and from security challenges such as trafficking, piracy and potential terrorist attacks, cyber and hybrid threats, notably through better maritime surveillance and capability development;
- fighting crime and terrorism more effectively, particularly through better prevention of criminal acts and enhanced investigation capabilities notably as concerns cybercrime;

- cybersecurity and a secure online environment, with citizens, public bodies and companies empowered to protect their data and online activities.

Those desired impacts are further specified in the following section in relation to each priority.

4. Key R&I Orientations

Within this cluster, civil security research will be progressively framed under the wider umbrella of a capability-based approach to capacity building in the security sector. This approach focuses R&I activities as a contribution (notably, but not exclusively, through technology) to fill gaps in capabilities. It is for policy-makers and practitioners to identify those gaps and resulting requirements, and in such a way that ensures they reflect national and the shared needs at EU level. The process for defining and implementing R&I activities in this cluster needs to recognise that Member States have the front line responsibility for security but cannot address transnational threats in an optimal way when acting on their own. R&I can support this process, including by improving cooperation and exchange of information, and by increasing knowledge about relevant human and societal factors. EU-level R&I to fill capability gaps reduces risks of fragmented approaches and promotes better use of standards and resources, thus increasing the impact of EU responses.

An integrated approach is needed so as to take into account short-term needs stemming from fast-changing security threats but also to promote a proactive anticipatory culture to address longer-term scenarios of future threats and mega trends.

In the field of security research it is particularly important to take into account human factors and the societal context, and to ensure the respect of fundamental rights, including privacy and protection of personal data and to engage citizens and communities in the process of making society more resilient via R&I-enabled technological, non-technological and social innovation.. Furthermore, improved knowledge of relevant human and societal factors can better achieve the desired impacts. In this context, the Commission intends to continue to require that applicants complete a ‘Societal Impact Table’ as part of the submission process.

Account will be taken of the gender dimension, notably as part of R&I relating to the human and societal context of security and of disaster resilience and response.

Availability of and access to threats, risk and resilience knowledge, preparedness scenarios and data, needs to be enhanced to strengthen capacities to forecast and to respond, and with practitioners’ involvement (e.g. knowledge centres and networks). This includes data sets representing simulated scenarios. If possible, specific European research infrastructures, including those of the European Strategy Forum on Research Infrastructures (ESFRI), contributing to the identified challenges will be harnessed and new capabilities will be developed as needed.

4.1 Disaster-resilient societies

This priority aims to allow for reduced losses from disasters, both in terms of impact on citizens and of environmental, economic, material and immaterial damage, in particular in vulnerable groups and areas, including heritage sites.

Disaster risk management can be improved through related R&I activities. This includes a better understanding of the disaster management cycle for incidents with a high impact but a low probability of occurrence (“Lo-Hi/HILP” events). In this context research will enhance societal risk awareness, prevention and preparedness, including through early warning and

alert systems and a capacity to be better prepared and able to respond to natural and man-made disasters

With the help of enhanced technological solutions and concepts, relevant communities can be better involved in the development and implementation of plans supporting cost-effective risk reduction and societal resilience, including for the evacuation of vulnerable populations.

An improved response to disasters requires better tools and procedures for the coordination of cross-border incidents, more integrated and interoperable technologies, tools and methods to support emergency procedures which are developed with all relevant actors. Finally, research can lead to the creation of standards on the EU-level for response and emergency planning.

Targeted R&I tackles cross-sectoral and multilevel governance on disaster risk management at EU level which manages also trade-offs in policy-making. This includes not only civil protection as such but related areas such as land management, agriculture and rural development, as well as environment, climate and energy. It will further contribute to the creation of methodologies to be defined for 'resilient by design' infrastructure. As a result of improved knowledge of human and societal factors, post-disaster recovery will respect local communities' aesthetic-historical-social values as well as quality standards for cultural heritage sites.

More specifically, there are four areas within the priority 'Disaster-resilient societies' which require more targeted R&I:

a) chemical, biological, radiological, nuclear and explosive (CBRN-E) incidents

There is need for a deeper understanding of CBRN-E risks as well as for the creation of specific measurements, including standards and certification for detection equipment, better comparability of data, both within EU and beyond.

CBRN-E incidents create unique risks also for first responders. Security research can help mitigate such risks by identifying and filling gaps in capabilities for response, mission critical communication and protection equipment for first responders. In addition projects will focus on capabilities for detecting and evaluating threats and incidents, or detection and triage of victims lead to an enhanced preparedness for and response to incidents.

R&I should further explore methods for seamless cooperation between relevant actors (e.g. law enforcement and civil protection authorities, health), including strengthening internal-external links (EU CBRN Centres of Excellence Initiative) and with key international partners (NATO, OPCW, Interpol).

b) climate-related risks and extreme events, such as fires, droughts, floods, heatwaves and storms

A consequent improvement in climate risk management will rely on more exact forecasting and understanding of climate change related risks and vulnerabilities, including their application within emergency planning. This is to be explored in connection with a generally more flexible adaptation to climate change impacts, including cascading and spill-over effects and improved cross-border management, both within the EU and at wider transboundary levels, of new and emerging climate change induced risks and impacts.

This includes science-to-practice knowledge exchange and use of sustainable, cost-effective and inclusive approaches, like nature-based solutions.

c) geological disasters, such as earthquakes, volcanic eruptions and tsunamis

Given the devastating potential of such disasters, R&I needs to support better preparedness for and response after such events. This includes better and technologically advanced civil protection capacities, notably faster detection and evacuation of victims.

d) pandemics and emerging infectious diseases⁵⁶

The most critical part in fighting pandemics and infectious diseases is earlier detection of outbreaks. Here exists a big potential for improvement via targeted R&I. Besides the detection, projects can explore ways to better respond, for example by European Pandemic Preparedness Plans⁵⁷ informed by scenario development, enhanced capabilities in case of cross-border events through validating operational strategies and technologies in real-case scenarios.

4.2 Protection and Security

4.2.1 EU external borders

This priority aims to support air, land and sea EU border management and is expected to allow for more effective implementation as a result of improved knowledge about human and societal factors underlying cross-border threats. The European Border and Coast Guard Agency (Frontex) will be closely associated with relevant R&I activities, taking into account its central role – proposed by the Commission (COM(2018) 631) – in defining capability requirements for the European Border and Coast Guard.

An effective border management relies on comprehensive information and its exchange between Member States and EU Agencies. R&I will therefore enhance the interoperability and performance of relevant EU information systems, leading to better and faster exchange as well as analysis.

With specific reference to movement of persons, whether crossing borders legally or illegally, the contribution of the European Border and Coast Guard Agency in identifying the relevant research requirements will be crucial. This should lead to the development of tools and methods for Integrated Border Management, in particular to increase reaction capability and capacity for monitoring movements across external borders. This will allow for better risk-detection, incident response and crime prevention.

Concerning the flow of goods, projects are expected to address requirements identified by EU customs authorities, most notably improved detection of fraudulent activities at border crossing points and throughout the supply chain.

⁵⁶ Activities in relation to pandemics and emerging infectious diseases will complement those undertaken under the cluster 'Health'.

⁵⁷ See the requirement for Preparedness Plans in Decision No 1082/2013/EU on serious cross-border threats to health, as well as the link with the International Health Regulations (2005).

4.2.2 Protection of public spaces⁵⁸

The core target of this priority is improved security and public safety, while at the same time preserving the open nature of urban public spaces. All measures to be explored by R&I in this area should ensure that citizens can continue their daily lives without major intrusions.

To achieve higher security for public space, research will identify concepts for prevention, preparedness and response of urban actors (city authorities, law enforcement authorities, public/private service providers, first responders and citizens) in response to threats of terrorist attacks in public spaces.

Technological innovations can increase the capacity to detect explosives, firearms and other weapons, as well as CBRN-materials being brought into public spaces. In case attacks cannot be prevented, enhanced effectiveness of mitigation measures including through strategies to reduce vulnerability and strengthening the resilience of potential targets have the potential to reduce the potential impacts of such attacks.

4.2.3 Security and resilience of infrastructure and vital societal functions⁵⁹

Activities conducted under the umbrella of this priority will ensure security and resilience of basic societal functions such as healthcare, law enforcement, energy, mobility, public services, financial services, communication and logistics infrastructures and networks (both physical, on ground and in space, and digital), so as to minimise societal disruptions.

In order to allow for effective countermeasures, there is a need for better risk assessments, especially taking into account interdependencies between different critical infrastructures and cascading risks arising from their disruption.

To better prevent and detect attacks (including cyber and hybrid attacks) or natural hazards as well as to allow for quick response, R&I will bring new tools for security actors (police, relief workers, disaster managers, crisis managers) notably in the fields of communication, surveillance and advanced robotics.

Technologies and also new concepts and cooperation instruments will help mitigation of consequences and allow for faster recovery of service performance levels, including leveraging the potentials of big data and artificial intelligence.

⁵⁸ This priority also relates to the intervention area 4.1 Disaster-resilient societies.

⁵⁹ This priority also relates to the intervention area 4.3 Cybersecurity.

4.2.4 Maritime security

This priority addresses capability requirements identified by the EU Maritime Security Action Plan. Research activities will therefore enable better maritime surveillance, risk awareness and management of EU critical maritime infrastructure border protection and coast guard functions. The scope of maritime security in this regard includes man-made and natural disasters, accidents, climate change as well as security threats such as terrorism and piracy, cyber, hybrid and CBRN threats.

The EU Maritime Security Research Agenda lays down in this regard specific areas to be addressed, including cybersecurity, interoperability and information sharing, autonomous systems, networking and communication systems and multi-purpose platforms.

4.2.5 Fighting crime and terrorism

This priority aims to bring improved prevention, investigation and mitigation of impacts of criminal acts, including of new/emerging types (such as those resulting from digitisation). This needs to be based on a deeper knowledge of human and social aspects of relevant societal challenges, such as violent radicalisation, child sexual exploitation, trafficking of human beings and cybercriminality, including support to victims.⁶⁰ Research can further help to transpose such knowledge into the operational activities of EU law enforcement agencies and civil society organisations.

R&I will support law enforcement agencies in better tackling crime, including cybercrime and terrorism as well as the different forms of serious and organised crime (such as smuggling, money laundering, counterfeiting of products, drugs trafficking, environmental crime or illicit trafficking of cultural goods⁶¹) by developing new technologies, tools and systems (including digital tools, e.g. artificial intelligence). This refers especially to capabilities to analyse in near-real-time large volumes of data to forestall criminal events, or to combat disinformation and fake news with implications for security.

In addition to improved knowledge and prevention, projects will deliver operational tools for enhanced criminal investigation capabilities for law enforcement agencies. This covers a broad range of activities from forensics, big data management to the investigation of cybercriminal activities, improved cross-border cooperation and exchange of evidence.

With regards to CBRN-E threats, R&I allows to generate knowledge for counter-terrorism on the continuously evolving methods related to dangerous chemicals, and the development of technologies to counter and respond to related incidents.

4.3 Cybersecurity

Supported by R&I under this priority, citizens, public authorities and companies, including SMEs, will be empowered to protect their data and online activities notably when using

⁶⁰ Activities in relation to smuggling and trafficking of persons will complement those undertaken in relation to migration under the ‘Social and Economic Transformations’ priority of the cluster ‘Culture, Creativity and Inclusive Society’.

⁶¹ Activities in relation to trafficking of cultural goods will complement those undertaken under the ‘Cultural Heritage’ priority of the cluster ‘Culture, Creativity and Inclusive Society’.

social media. Research will be aligned with the activities of the Cybersecurity Competence Centre and Network of National Coordination Centres (Commission proposal COM(2018) 630)⁶² will take into account activities of the pilot networks of cyber competence networks and will be coordinated with the Digital Europe Programme.

This requires a resilient critical digital infrastructure, both private and public, that better protects the Digital Single Market and the digital life of citizens against malicious cyber activities, including via non-digital fall-back technology and appropriate levels of systemic redundancy. Research should strengthen European cybersecurity industrial capacities and thus increase the strategic autonomy vis-à-vis foreign technologies.

R&I will support in this regard use of innovative digital technologies, including self-healing, artificial intelligence, cryptography, massively distributed computing and storage, as well as quantum to increase data security and augment cybersecurity. It will further allow for security-relevant innovations in the area of governance of algorithms, coding architecture and programming languages. All these measures are aiming at defending the EU's high standards concerning right to privacy, protection of personal data, and the protection of fundamental right in the digital age on the global stage.

The frequency and complexity of cyber-attacks from state and/or criminal actors is increasing rapidly. R&I will therefore need to support the effectiveness and coordination of measures to respond to them.

An emerging threats in the cyber-area are attacks against democracy and European societies, including electoral meddling, fake news, and online forgeries and manipulation. In order to allow for an adequate response for the coming years, research is necessary to better understand the nature and source of such attacks as well as technologies and strategies to counter them.

For all activities against cyber-threats, the architectural principles of 'security-by-design' and 'privacy-by-design' will be implemented in digital technologies and their applications, such as 5G, industry 4.0, artificial intelligence, Internet of Things, blockchain, quantum key distribution, mobile devices and connected cooperative and autonomous mobility and energy.

European Partnerships

No new partnerships are currently suggested under this cluster.

Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas;

- adaptation to climate change including societal transformation

⁶² The proposed Regulation is still under discussion.

- cancer
- healthy oceans, seas, coastal and inland waters
- climate-neutral and smart cities
- soil health and food

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

ANNEX 4 - HORIZON EUROPE CLUSTER 4

DIGITAL, INDUSTRY AND SPACE

1. Global Challenges and Their Drivers

Digitisation and technological progress, including Space, shape all sectors of the economy and society. They transform the way industry develops and produces new products and services, as well as the way we live, work and learn, and are central to any sustainable future. To succeed in this transition, research and innovation needs to target global leadership and autonomy in strategic value chains;⁶³ enable production and consumption to respect the boundaries of our planet; and maximise the benefits for all parts of society including the wide variety of social, economic and territorial contexts in Europe.

Sufficient positive changes on these fronts can only happen by facilitating technological progress and steering digital and industrial transformation. EU industry, including both SMEs and large companies, therefore needs continued EU support for the development and uptake of smart and clean technologies. However, the EU cannot do this alone. Partnership initiatives could help leverage the necessary additional private and public funding and align research and innovation priorities across Europe. There are **three main challenges**:

- (i) Although Europe has been a leading player in research and innovation across a number of industrial sectors, this position is more than ever at stake and eroding. Reliance on imported key technologies and raw materials is compromising Europe's autonomy. Europe's industry faces fierce **global** competition, combined with difficulties in financing high-risk investments in complex technological areas, including digitisation and circularity. It is also hampered by ageing infrastructures, including machinery that is not ready for digitisation and plants not fit for a fully circular and climate neutral industry; and by a lack of scale-up and technology diffusion capacities. Long investment cycles are needed in key EU industries, notably the energy-intensive industries.

Key facts and figures:

- ➔ Industry, including manufacturing, processing and construction, makes a significant contribution to the European economy, and provides 36 million jobs, although this has steadily declined. Manufacturing in particular generates EUR 32 billion of added value, a share of around 16% of total added value.
- ➔ While Europe is one of the world largest markets for **digital products and services**, the contribution of European industry and businesses to the worldwide digital supply

⁶³ The Commission unveiled preliminary recommendations of the expert group on strategic value chains, the Strategic Forum for Important Projects of Common European Interest, to prepare coordinated action and investment to strengthen key strategic value chains. For instance, low-carbon Industry and Industrial Internet of Things have their centre of gravity in this cluster. https://ec.europa.eu/growth/content/stronger-and-more-competitive-eu-industry-president-juncker-open-2019-eu-industry-days_en

chain has shrunk gradually over the past 20 years.⁶⁴ Most recently (2017-18), EU companies reduced their global R&D share in ICT industries by more than 8%.⁶⁵

- ➔ Space technologies, data and services have become indispensable in the daily lives of European citizens: when using mobile phones and car navigation systems, watching satellite TV, enhancing weather forecast and improving emergency services. The value generated from **space related activities** is estimated between EUR 46 to 54 billion representing a share of 21% of the worldwide business. In addition, the capacity to access and use space is a strategic asset for Europe and its Member States, which impacts many other sectors,⁶⁶ and opens up many business opportunities for early-stage and high-tech companies, especially in combination with digital technologies and other sources of data. The EU must make the most of these opportunities by fully developing and exploiting the potential of European Space Programmes and its components Copernicus, EGNOS and Galileo, SSA and GOVSATCOM.
- ➔ Research and Innovation are recognised as an important source of economic growth and competitiveness, but there is an **urgent need for more investments** in Europe, in particular in industry. Industry accounts for 64% of private sector R&D expenditure and for 49% of innovation expenditure.⁶⁷ The R&D conducted within the business enterprise sector in the EU was equivalent to 1.36 % of the EU-28 GDP in 2017, significantly below the EU's 2% target for the private sector and lower than in South Korea (3.27%), Japan (2.57%), Switzerland (2.39%) and the United States (1.97%).⁶⁸ In digital for example R&D intensity is about 5% as opposed to 12% in the US and 11% in Japan.⁶⁹
- ➔ The EU shows higher shares of R&D in medium-tech sectors (circa 40%) as compared to USA and China (circa 20 and 30%), while lower shares of R&D in high-tech sectors are seen with respect to USA and China (circa 75 and 43%). There is a need to integrate horizontal industrial and innovation policies with sector/technology specific ones, to promote the industrial transformation towards the knowledge economy by reinforcing the presence of high-tech sectors, while fostering the modernisation of low- and medium-tech sectors and their capacity to absorb new technologies.
- ➔ EU public investment in R&D in digital technologies is 40% less than in the US; and in critical areas, such as Artificial Intelligence (AI), public and private investments in

⁶⁴ *Etude sur l'écosystème électronique: Vue d'ensemble, développements futurs et position de l'Europe dans le Monde*, 2018 DECISION Etudes & Conseil

⁶⁵ 2018 EU Industrial R&D Investment Scoreboard <http://iri.jrc.ec.europa.eu/scoreboard18.html>

⁶⁶ The European space economy, including manufacturing and services, employs over 230 000 professionals in a large number of SMEs. Its value was estimated at EUR 46-54 billion, representing around 21% of the value of the global space sector. It captures around 20 % of the open world markets, and a dynamic downstream services sector. Satellites provide immediate information in support of numerous Union policies.

⁶⁷ Re-finding Industry. Report of the independent HLG on Industrial Technologies, 2018.

⁶⁸ Non-EU28 countries figures are from 2015. EUROSTAT database

⁶⁹ 2012 PREDICT REPORT

<http://is.jrc.ec.europa.eu/pages/ISG/documents/OnlineversionFINALPredict2012withnumbersv2.pdf>

the EU are 4 times less than in the US. China set up a strategy plan⁷⁰ to support an AI industry worth 150 b\$ including the development of AI chips. This complements the 2025 plan, which strives to secure its position as a global powerhouse in high-tech industries, and focuses heavily on intelligent manufacturing in 10 strategic sectors. The strategy seeks to raise the domestic content of core components and materials to 40% by 2020 and 70% by 2025.⁷¹ In Space, the EU governments' investments of EUR 8.2 billion in upstream space programmes are well under half of the NASA budget, and probably under one third of the total US space budget.

- ➔ SMEs tend to implement new technologies at slower rates than larger companies. For instance, 36% of companies with 50-249 employees use industrial robots, compared to 74% of companies with over 1000 employees. Only a fifth of EU companies are highly digitised.

(ii) Europe's industry can adapt to **planetary boundaries**, through a transformation that will allow it to cope with a scarcity of resources, including energy; and to reduce its large share of greenhouse gas emissions, pollution and waste.

An accelerating global resource consumption has increased environmental pressures beyond sustainable levels. As a major user of natural resources, industry needs to reduce its carbon and materials footprint in order to ensure sustainability in the circular economy and to reach Paris Agreement targets. New technologies should notably reduce energy consumption and be part of a circular economy value chain which will contribute to Europe's competitiveness in a context of increased sustainability standards.

Key facts and figures:

- ➔ Industry is the third biggest contributor to greenhouse gas emissions. The latest increase of CO₂ emissions is of particular concern, considering the efforts needed to comply with the Paris Agreement and a climate-neutral economy by 2050. Hence an overhaul of business models as well as disruptive technologies are needed.^{72 73}
- ➔ The global energy consumption by industry grew by an average of 1.3% each year between 2010 and 2016. In the EU28, between 2005 and 2016, final energy consumption decreased by 7.1% (0.7% annually) in all sectors, particularly in industry (16,4 %).⁷⁴
- ➔ According to the International Energy Agency (IEA),⁷⁵ global industrial emissions in 2016 amounted to 8.3 GtCO₂, or 24% of global emissions. Amongst the EU sectors, steel, cement and chemicals dominate industrial emissions. In a "business as usual" baseline scenario, EU emissions from these three sectors could amount to 546 MtCO₂ per year by mid-century. To achieve climate-neutrality in 2050, significantly larger

⁷⁰ New Generation of Artificial Intelligence Development Plan

⁷¹ Made in China (MIC) 2025

⁷² A Clean Planet for All, COM(2018)773 final

⁷³ The Club of Rome Climate Emergency Plan, December 2018, <https://www.clubofrome.org/2018/12/03/the-club-of-rome-launches-the-first-climate-emergency-plan/>, "...global carbon emissions must be cut by half by 2030, to zero by 2050. This is an unprecedented task, requiring a reduction rate of at least 7% annually; no country has to date achieved more than 1.5%."

⁷⁴ European Environment Agency [database](#).

⁷⁵ <https://www.iea.org/tcep/industry/>

investments in deep decarbonisation technologies are needed. These investments are estimated to be around an additional EUR 5.5 billion per year for the above mentioned sectors, an 88% increase compared to the baseline scenario.⁷⁶

- ➔ The rapid expansion of the digital sector has environmental consequences, including considerable increases in the extraction of critical raw materials, in energy consumption (e.g. from digital infrastructure and other auxiliary equipment), as well as in Green House Gas emissions (4% of global annual increase⁷⁷).

(iii) Developments in industry and in enabling technologies have the potential to enhance **social inclusion**. Workers, regions and societies are faced with extremely fast transformations, including the impact of digitisation and climate change.

The challenges in Europe are the rapid adoption of new technologies and their impact on the labour market and the nature of work; skills mismatches and increasing wealth concentration. Other **concerns regarding new technologies** include trust and ethical considerations. All the new approaches must engage citizens, workers and consumers, focusing on training and familiarity with technology. This is also necessary to make the new climate-neutral and circular economy approaches and products work.

Key facts and figures:

- ➔ There are substantial variations in the level of economic activity and labour market performance across Europe, including in their technological specialisation and R&D investment. Long-term economic and industrial decline, low levels of education and a lack of local employment opportunities emerge as key drivers of the anti-EU vote.⁷⁸
- ➔ Evidence indicates a considerable accumulation of wealth by a small segment of society, as others face increasing hardship and a widening inequality gap. The Commission's Ethics Group warns that new forms of work bring unparalleled flexibility but also precariousness; and exposes the limitations of existing social models to guarantee decent livelihoods for many Europeans.⁷⁹
- ➔ Due to the deployment of new technologies and automation, there is an increase in the number of high-skilled jobs. However, around 20% of European workers judged their current ICT skills insufficient. The highest skill mismatches are in occupations related to ICT, manufacturing and construction. A third of the EU labour force has an insufficient level in digital skills.⁸⁰ The lack of skilled individuals and talents risks slowing down investments. For instance, 9 out of 10 manufacturers are struggling to find the skilled workers they need. Similarly, more than half of companies looking for ICT specialists report difficulties in recruiting them. Hence, there is a need to reform the current educational system, and better anticipate and develop skills to equip the labour force with appropriate skillsets.

⁷⁶ Industrial Transformation 2050, Pathways to Net-Zero Emissions from EU Heavy Industry, Material Economics and ECF, 2019

⁷⁷ https://theshiftproject.org/wp-content/uploads/2019/03/Lean-ICT-Report_The-Shift-Project_2019.pdf

⁷⁸ [The Geography of EU Discontent](#)

⁷⁹ [Future of Work, Future of Society - European Group of Ethics in Science and New Technologies, December 2018](#)

⁸⁰ Digital Economy and Society Index, <https://ec.europa.eu/digital-single-market/en/desi>

- ➔ New technologies such as digitisation and automation will reshape economies and societies in all the regions and will have differentiated impacts across the regions and also across the regions within one nation in Europe and globally.⁸¹

2. EU Policy Objectives

Against this background, the overarching vision behind the proposed investments is **a European industry with global leadership in key areas, fully respecting planetary boundaries, and resonant with societal needs** – in line with the renewed EU Industrial Policy Strategy.⁸² Three objectives will be pursued across the cluster, in synergy with other EU instruments and initiatives:

(i) Ensuring the **competitive edge and autonomy of EU industry**.

Key enabling technologies, including digital ones, and new services offered by digital and space technologies, will help revolutionise both industry and society and reinforce Europe's global industrial leadership. Developing and mastering these technologies will give EU industries the competitive edge they need for leadership in global markets; and promise innovation and market breakthroughs to achieve a circular, resource efficient and climate-neutral EU economy.

In a globalised world of heightened uncertainties and volatile geopolitical interests, it is essential to secure and assert European autonomy in a number of strategic technology areas and value chains, while continuing cooperation and exchanges with third countries.

To be autonomous, the EU must tackle missing segments in key strategic value chains. To begin with, it must ensure a secure and sustainable supply of raw materials, maximising the value of its resources and materials. Examples are batteries, low-carbon industry, space critical components, smart connectivity platforms and microelectronics.

Another vital component of the EU's strategic autonomy is technological non-dependence, to safeguard security of supply and European industry's ability to export its products as part of a global value chain. For the EU Space industry for instance, non-dependence is key for a number of components used for satellites and launchers.

To maximise impact, we must ensure that all European enterprises, including small-and medium-sized enterprises and start-ups, have access to the technologies and data they need, by promoting an **ecosystem of technology infrastructures**, catering for industry, including SMEs and start-ups; and by establishing a European data ecosystem, in conjunction with the Digital Europe Programme.

(ii) Fostering **climate-neutral, circular and clean** industry: the pressing need to tackle a number of sustainability challenges, notably climate change, creates opportunities for developing new technologies allowing industry to reduce energy consumption, protect the environment and enable a circular economy. Europe should take the lead in this approach.

⁸¹ OECD Regional Outlook 2019 - Leveraging Megatrends for Cities and Rural Areas, <http://www.oecd.org/regional/oecd-regional-outlook-2019-9789264312838-en.htm>

⁸² Investing in a smart, innovative and sustainable Industry A renewed EU Industrial Policy Strategy, COM(2017)479.

The breakthrough technologies and solutions to be developed in this cluster⁸³ will, in conjunction with new business models, contribute to bring about climate-neutral EU industries by 2050, thereby delivering on the 2050 Long-term strategy, calling for a climate-neutral Europe by 2050;⁸⁴ and foster a circular economy.⁸⁵ Future factories will be climate-neutral, resource-efficient and fully integrated in the circular economy. The climate-neutral and circularity ambitions will reinforce one another.

Earth observation from space, combined with advances in computing, analytics and artificial intelligence, will bring invaluable information on the climate of our planet and its environment that will guide the development of mitigation measures.

- (iii) A **major contribution to inclusiveness**: From the outset we must involve and empower workers, consumers and firms to make sure that they have access to, and take up, these technologies (reflecting gender and other diversity issues where appropriate). *In conjunction with other programmes and initiatives*, there must be adequate support for the development of skills and the development of regions, cities and rural areas – ensuring a socially fair transition not leaving anyone behind. We must also pay due regard to safety, and to the impact of technologies and industrial transformation on people and societies.

The EU technology developments will follow a **human-centred approach**, going hand in hand with European social and ethical values, social inclusiveness, and the creation of sustainable, high-quality jobs including through social innovation. For example in Artificial Intelligence developments will follow the key requirements⁸⁶ for trustworthy AI identified by the High-Level Experts Group established by the Commission.

The interaction of science, technology, social sciences and humanities will be important in this respect, as will be the input of creative sectors and artists to sustainable inclusive innovation and to human-oriented technologies.⁸⁷

Beyond this cluster, the other clusters will also develop and apply key enabling and emerging technologies, as part of a common strategy to promote the EU's industrial and social leadership.

3. Targeted impacts

By 2030, industry will be providing one out of four jobs, having set the transition to climate-neutrality before 2050 on a solid ground.

In key strategic value chains,⁸⁸ European players will be present to secure EU non dependence / autonomy and secure leadership in key enabling technologies

⁸³ including low-power processors and computing architectures

⁸⁴ A Clean Planet for all – A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy, COM(2018)773

⁸⁵ Closing the loop - An EU action plan for the Circular Economy, COM(2015)614

⁸⁶ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Building Trust in Human Centric Artificial Intelligence (COM(2019)168)

⁸⁷ www.STARTS.eu

⁸⁸ https://ec.europa.eu/growth/content/stronger-and-more-competitive-eu-industry-president-juncker-open-2019-eu-industry-days_en

Input from the activities under this Cluster will inform up-skilling training programmes, and lead to appealing and creative jobs across Europe.

More specific impacts are outlined under the specific R&I priorities that follow.

4. Key R&I Orientations

Key R&I Priorities are grouped in two general categories: (I) Enabling technologies ensuring European leadership and autonomy; and (II) Accelerating economic and societal transitions (these will be complemented by priorities of other clusters).

The cluster will emphasise **international cooperation** in areas of common interest, in pursuit of a level playing field, reciprocity and common standards; and also highlight Europe's strong position in sustainability.

I. Enabling technologies ensuring European leadership and autonomy

4.1 Manufacturing Technologies

Innovative manufacturing technologies will contribute to sustainable prosperity for all and reinforced strategic advantages in terms of increased productivity, enhanced job quality and reduced carbon footprint. Priorities include:

- Expanding the creation of new, value-added job creation through technology-driven innovations in design, engineering, logistics and end-of-life management; innovative business approaches, such as customisation and product-service systems; and applications of emerging technologies such as AI and human-robot collaboration that provide the basis for improving the quality of jobs.
- Strengthening and creating value chains based on digital industrial platforms, benefitting the production sectors from automotive and aerospace to health and food processing.
- Capitalising on the digital transformation to raise productivity and realise shorter innovation cycles, new business models, urban and distributed manufacturing, higher quality products and enhanced workplace skill-sets.
- More circular economy, with products reused in new value chains through “zero-waste” manufacturing, de- and re-manufacturing, including smart recycling, re-use of raw materials, repair and refurbishment.
- Developing bio-integrated manufacturing through the combination of disciplines including fundamental research in biology, engineering, machine learning and manufacturing and processes such as biomachining, biomimetics, biomechanics, and bio-inspired digital manufacturing.
- Enabling a “new way to build”, for construction with lower environmental footprint, through modularisation, digital technologies, circularity and advanced materials, as well as standards and safety.

These investments should turn manufacturing into a human-centred, highly flexible and sustainable enterprise, providing attractive jobs, including in cities and in peri-urban areas; supporting leadership in strategic value chains; and offering new products for new markets.

4.2 Key Digital Technologies

The opportunities from digitisation are immense and are driven by advances in technology, applications and services around a set of main tracks.

At the heart of digital transformation is the continuous progress in the key underlying electronics and photonics components and systems, software technologies and connectivity platforms. Further scaling in mainstream nanoelectronics raises physical and economic challenges, but progress in digital components and devices continues through disruptive innovations, thanks to new materials (such as graphene), low-power electronics and alternative processing concepts, like neuromorphic, that map cognitive processes into electronic circuits, and quantum information processing. These innovative approaches unfold a new era of digital applications providing unprecedented levels of computing power, trust and security, as well as high precision sensing and low energy consumption.

These developments will provide the basis for new computing and programming concepts such as edge computing, and for advances in modelling and simulation (e.g. digital twins). They are bringing the benefits of digital innovations, notably Artificial Intelligence and big data analytics, to all types of products and services from connected and autonomous vehicles to health equipment, novel materials and drugs, and smart energy systems.

Europe can capitalise on its recognised strengths in reliable cyber-physical systems, in embedded and enterprise software and complex systems to seize the wide range of opportunities ahead.

The EU's current strong industrial value chains (e.g. automotive, aerospace, machinery and agro-food) are increasingly dependent on these core digital components and software.

4.3 Advanced Materials

New materials are the key to virtually every global challenge. To realise their potential, we must be able to develop advanced and sustainable materials with the required properties, often inspired by biological systems; and to make sure that the widest possible community of users will be able to capitalise on them.

The materials development cycle is long and entails steps such as characterisation, modelling, upscaling and engineering, including in industrial environments. The aim is to develop materials that are functional, safe, sustainable and competitive, serving needs in global challenges and respecting regulatory standards. In particular they will need to conform to the circular economy. A coherent approach to life-cycle methodologies will assure developing and monitoring a cradle-to-cradle approach, supporting further the principle of the European eco-label too. They will also need to be taken up in industrial value chains; the relevant choices may be eased through a greater availability of evidence.

Integrating creativity into product design and development, through the involvement of creative professionals to support an “innovative materials by design” approach, is an efficient way to answer the growing consumer demand for innovative products combining functionality with aesthetics, and innovative solutions along the circular materials cycle.

To enable uptake by industry, especially SMEs and start-ups, there is a need for an innovation ecosystem of materials technology infrastructures, including open innovation testbeds and pilot lines. These will cover all relevant enablers and services needed for

innovation based on new materials. In addition to responding to industrial needs, they will reduce the technological risk of innovative materials and products, thus attracting more investors, and cut the time to market.

These investments should lead to multifunctional and safe new materials, comparable to living organisms, embedded in strategic value chains and radically reducing environmental footprint.

4.4 Emerging Enabling Technologies

Fascinating technologies that we could not imagine even a few years ago hold the potential to revolutionise the way in which we live and work. New enabling technologies will be needed as current ones become obsolete or clash with planetary boundaries. By exploring the potential of such technologies at an early stage, Europe can secure leadership in key enabling technologies of the future.

The objective of these activities will be to facilitate the early development (at low TRLs) of a limited number of new enabling technologies and feed the innovation pipeline. This will be done by scouting for transformative research themes, building also on the results of Pillars I and III; and by exploring their potential for society, the environment and industry.

Success depends on the combination of disciplines, from fundamental research in natural sciences to engineering, manufacturing and computer learning. Social sciences and humanities will also play a role in envisaging the transformation pathways.

Examples include:

Future and emerging materials by design: A wide range of global challenges call for new materials by design, which are functional, safe, recyclable and sustainable (e.g. new plastics and polymers, catalysts, coatings and membranes).

Enhanced information-based technologies inspired by the laws of nature and biology: an improved fundamental knowledge of how living beings function will enable new applications of biotechnology supporting sustainability.

The convergence of the “digital” and the “physical” and entirely new forms of digital technologies, like computational modelling of processes such as metabolisms, or the dynamics of cell differentiation. They will bring long-term benefits for citizens while transforming industrial processes for a circular and sustainable economy (e.g. progression of neuro-degenerative diseases, the chemistry of photosynthesis, climate change and environmental impacts, or the dynamics of social behaviour).

4.5 Artificial Intelligence and Robotics

Driven by increased computing power, the availability of large amounts of data (the essential raw material for innovation, competitiveness and growth) and progress in algorithms, smart devices and smart robots, Artificial Intelligence (AI) is shaping up as one of the most strategic technologies of the 21st century. The way we approach AI will define the world we live in.

Amid fierce global competition, a collective and decisive EU Research and innovation agenda for AI will be instrumental in bringing its benefits to all our citizens and businesses

whilst ensuring high ethical standards.⁸⁹ The EU must also promote the adoption of principles and global standards which will ensure an ethical approach to the development and use of technologies at both EU and international level.

Citizens will experience the advantages of AI in daily life, such as traffic optimization and autonomous driving to reduce citizens everyday stress and drastically reduce the number of road accidents, to truly intuitive AI-based systems adapting to human needs, to support them in specific tasks, improving their working conditions, and making the technology easy to use by all, even the non-experts in AI. Also the society as a whole will benefit from AI-based solutions to optimise the lifecycle of resources (energy, food, etc.), and make it more environmentally and economically sustainable, from production to distribution and use. Medical doctors will ask the support of powerful data-intensive machine learning to support their diagnostic and therapy decisions. Firefighters will get the support of robots to approach hazardous intervention zones.

The introduction of AI and autonomous behaviour in complex, safety- and time-critical systems, such as those used in large transport networks, avionics, health or industrial applications, is a technological challenge but also a significant business opportunity for which Europe has a competitive advantage. Europe also needs to deploy a human-centric, ethical and trustworthy AI, which will be crucial for its acceptance, and a trademark for AI developed in Europe.

The challenges in AI and Robotics (embodied AI, one of European strength AI) include foundational research improving hardware, algorithms, achieving explainable AI (transparent decision making), adaptive learning, and improving smart, collaborative, safe and efficient robots and autonomous systems, as well as applied research to demonstrate progress for applications needs. Common AI platforms and reinforced collaboration among researchers are expected to combat fragmentation.

These investments should lead to significant European advances in AI, characterised by increased societal engagement and human-centred approaches.

4.6 Next Generation Internet

The Internet has become the critical infrastructure for Europe as many social and economic activities depend on it.

The Internet of today has significant limitations. The risk of breaches of security or privacy, lack of accessibility, lack of user control of their data, and manipulation or disinformation are some of the major challenges to be tackled.

Furthermore, the internet economy is vulnerable to concentration of market positions from devices to networks. Concentration in few powerful providers generate potential threats of user lock-in. Breaches of citizen's security or privacy, lack of accessibility, lack of user control of their data, and manipulation or disinformation are some of the major challenges to be tackled.

Being a global network of networks Europe has no choice but to invest further in R&I to be a leading force shaping its technological and market development.

⁸⁹ Communication 'Artificial Intelligence for Europe' & Coordinated Plan on Artificial Intelligence (COM(2018) 795 final)

The next generation Internet (NGI) initiative aims to develop the key technology building blocks and the infrastructures for the Internet of tomorrow, while addressing the growing societal and political concerns and service needs, with a human-centric trustworthy internet enabling full connectivity and accessibility and collective intelligence (people, processes, data, content and things) and safeguarding core European values. It aims at supporting an autonomous European Internet supply chain, which can meet the future industrial and societal needs establishing Smart Networks and Services (including Internet of Things, cloud/edge computing continuum, and cognitive cloud) and Content platforms. The initiative addresses the innovative immersive, media and business applications supported by such platforms. It builds on a comprehensive strategy including a technology push and an application/ market/ end-user pull, and composed of technological layers with different time to market cycles.

Interactive Technologies, including immersive technologies and language technologies, will allow for a more inclusive, user-oriented/driven and innovative use of computers, machines and the Internet.

Distributed ledger technologies, being cross-cutting enabling technologies which support efficiency and trust in validation of transactions, can enable the development of EU data spaces while empowering citizens, public services and businesses to control and share access to data.

4.7 Advanced Computing and Big Data

Today, Europe critically depends on foreign supercomputing technologies that are essential for scientific and industrial innovation; and its supercomputing supply industry provides only around 5% of supercomputing resources worldwide, whereas Europe consumes around 30% of these resources.

As transistor-based computers are reaching physical limits, the next generation of computing capabilities will be developed based on disruptive concepts, technologies and paradigms, keeping in mind environmental standards (e.g. ‘Green ICT’).

Europe has to be in the forefront of inventing the next generation low power processors and accelerators, integrate them in novel computing architectures and hybrid/modular systems to address future general purpose and/or specific applications.

Examples include R&D into novel neuromorphic architectures, quantum computing components, 3D and interposer/chiplet computing architectures, aiming to deliver the significant improvements of computational capability, performance and energy efficiencies required.

Combined with those advances, R&D will be also required for co-designing software, algorithms, programming models, simulations and tools for their integration in novel computing systems. These could be used for supporting the development of large-scale and industry-led pilot applications targeting key industry sectors, but also for public services like weather forecasting and climate modelling.

Further R&D efforts will also be required for advancing the state-of-the-art of extreme performance data analytics and prediction methods that enable the processing of Big Data - increasing volumes and streams of data that arrive from numerous sources at rates that are growing too fast for traditional computing methods.

While the abundance of data is a core element for computing complex problems and solutions, it may conversely create problems, in particular as regards the protection of personal and sensitive data (e.g. commercial data, trade secrets, health data etc.) that need to be protected by privacy-preserving technologies respecting the rights of data subjects and content creators.

In the same vein, some complex problems can only be computed and solved with a sufficient critical mass of data that may only exist in isolated silos that need to be connected. To ensure that diverse data from different sectors and of different types can be seamlessly combined and exploited across sectorial and national borders, methodologies and tools are needed to ensure interoperability and to keep track of the provenance, quality and completeness of data sets.

Furthermore, sustainability issues posed by digital technologies should be taken into account, notably when it comes to the energy efficiency of computing, which should be improved by several orders of magnitude.

These investments should allow Europe to rely on its own high-performance computing technologies.

4.8 A globally competitive space sector reinforcing EU autonomy

R&I actions will foster the competitiveness of space systems in particular for ultra-high throughput telecommunication, support the integration of satellites in 5G networks and high-resolution earth observation. Digital and automated industrial processes will enable seamless manufacturing for the production of cost effective space systems including constellations. In the mid to long term, the future space ecosystem should include hybrid, smart and reconfigurable satellites, which can be assembled and serviced directly on-orbit, with a de-orbiting capacity.

EU autonomy in accessing and using space will be reinforced with new concepts for reducing the production and operation cost such as reusability of launcher components, low cost, high thrust and green propulsion, micro launchers, new types of payloads and space routes. Opportunities for in-orbit validation (“IOV”) and in-orbit demonstration (“IOD”) will contribute to de-risk new technologies, concepts and applications. These will be operating from modern and flexible launch facilities.

EU-funded research will also contribute to critical technologies, space science and missions and outreach and education activities. Synergies with non-space sectors will be promoted as well as downstream exploitation.

These investments should lead to globally flexible, reconfigurable and competitive space assets and services, which can be tailored to evolving customer needs. This will provide the EU space sector with a global competitive edge, enhance its autonomy, contribute to the EU Space Strategy as well as to societal challenges. These objectives will be pursued jointly with the European Space Agency and national space programmes in Europe in a mutually supportive and coherent approach.

II. Accelerating economic and societal transitions

4.9 Circular Industries

In a circular economy, the value of products, materials and resources is maintained for as long as possible and waste is minimised. The EU Circular Economy Action Plan⁹⁰ includes a wide range of initiatives for a sustainable, low-carbon, resource efficient and competitive economy. It also relies on research and innovation through the entire life-cycle to prevent new and larger waste streams and to tackle scarcity of resources, and price volatility. Also needed are solutions to increase material efficiency and recover the economic value of waste streams, while radically decreasing their environmental footprint. Priorities include:

- Design of circularity enabled products, implementation of circular supply chains and systematic cradle-to-cradle life cycle assessment both for new and existing products;
- Product life extension through predictive maintenance, repair, re-use, and refurbishment leading to value loops at European scale;
- Advanced solutions and conditions for the sustainable exploration, extraction and processing of raw materials; and also their substitution, recycling and recovery in industrial symbiosis settings;
- New automated technologies to sort, dismantle and remanufacture or recycle products; and efficient processes to handle mixed waste sources;
- Digital and industrial technologies like robotics, artificial intelligence, and digital platforms for energy intensive industries leading e.g. to fully fledged cognitive plants

Circular approaches need to be systemic, connecting people, products and systems. The focus will be on sectors, products and materials that have the highest impacts and the greatest potential for enhanced circularity.

These investments should reinforce European autonomy, through access to a sustainable and affordable supply of raw materials, in particular critical raw materials (through substitution, resource efficiency, better recycling and a clean primary production) reduce the dependence on overseas handling and processing of municipal and industrial waste.

4.10 Low-carbon and Clean Industries

Energy-intensive industries have a central role in the EU's industrial value chains. Heavily reliant on energy and non-energy raw materials, they will need to supply products with zero net emissions for downstream manufacturing. Deep decarbonisation calls for breakthrough technologies in all major emitting industrial sectors, in terms of: the underlying production processes (e.g. for steel, cement and chemicals); substitutes for carbon-intensive products; and decarbonised energy and feedstock.

By 2030, Europe's regions should benefit from entirely new types of industrial plants producing sustainably with zero greenhouse gas and polluting emissions and zero waste while being globally competitive.

The required technologies include process and heat electrification, switch to decarbonised energy and feedstock, CO₂ capture and usage, catalysis and artificial photosynthesis, waste heat recovery, and materials for re-use and recycling, all of which need to be developed and

⁹⁰ COM(2015)0614

demonstrated in industrially relevant or operational environments before the first market deployment in the EU.

Industries will need to coordinate innovations and investments in clean energy systems, with a much higher share of renewables, far beyond what is already foreseen for 2030 (32.5%). A closer integration is needed across value chains, giving rise to new business models, processes and technologies in which waste and emissions would be either avoided or transformed into valuable resources for new innovative processes and industries. Co-located industrial plants, which can adapt their production to fluctuations in energy and resource flows, would ensure flexibility in energy and feedstock utilisation, including through industrial symbiosis amongst adjacent plants.

A closed-loop system, based on complex flows of resources, energy and information, would be supported, including through artificial intelligence-based technologies. Long-lasting arrangements are needed with renewable energy and storage providers to develop the necessary capacity, reduce security of supply risks and channel resources where they are most needed. These approaches also call for new business models, skills, and financial solutions; and need to be developed in conjunction with the priority ‘support industrial facilities in the energy transition’ under the Cluster ‘Climate, Energy and Mobility’.

By 2030, these investments should lead to a large set of industrial plants in several regions, with zero net emissions of greenhouse gases, zero waste and zero polluting emissions - and by 2050, to factories that are climate-neutral, resource-efficient and fully integrated in the circular economy.

a. New services from Space for the EU society and economy

R&I activities will prepare for the next generation and applications of European Global Navigation Satellite Systems (Galileo/ EGNOS) which will provide precise positioning, navigation and timing. This will make intelligent mobility, connectivity and infrastructures a reality, whilst ensuring a non-dependent and sustainable supply chain, and integration with other technologies such as 5G.

Innovative applications will be developed for European and global uptake for the **European Union** Earth Observation System (Copernicus), in areas such as, for example, climate mitigation, monitoring GHG, environment, including Polar Regions, urban planning, security, etc. These will rely on innovative and evolutive data and information infrastructures and services.

Further developments in sensors technologies and data processing will be supported as well as new services for Space Surveillance and Tracking (SST) and research on space traffic management, space weather and near Earth objects necessary to ensure the security of critical infrastructure both in space and on Earth for **Space Situational Awareness (SSA)**.

R&I activities will support user equipment and system solutions for space and ground infrastructure for **Satellite communications for EU governmental actors (GOVSATCOM)** as well as citizens and businesses.

These investments will provide EU citizens with more accurate mobility services, higher resolution earth observations for climate and environment as well as more efficient and new emergency and security services.

5. European Partnerships

Considering that Europe's industry is investing less than its global competitors, in particular in high-tech areas, and taking into account the need to accelerate the industrial transformation to climate-neutral and circular industries, this cluster will be instrumental in mobilising industry and leveraging greater public and private investment towards common goals.

Partnerships⁹¹ have proven instrumental. They would be more effective compared to ordinary calls because they would ensure industries working together across sectors and value chains, based on predefined targets. This is a pre-requisite for achieving, for instance, circular economy goals, where cross-sectoral cooperation along and across value-chain cooperation is vital. The following areas for future partnerships with a lead under this cluster have been identified:

- Made in Europe
- Key Digital Technologies (institutional)
- Photonics
- Artificial Intelligence, data and robotics
- Smart networks and Services (institutional)
- HPC (institutional)
- Circular and Climate-neutral industries
- Clean Steel
- Metrology (institutional)
- Global Competitive Space Systems

6. Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas;

- adaptation to climate change including societal transformation
- cancer
- healthy oceans, seas, coastal and inland waters
- climate-neutral and smart cities
- soil health and food

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

⁹¹ In the field of digital and industrial technologies, these included 2 institutional, 10 contractual and 1 public-public partnerships; and 3 Knowledge and Innovation Communities

ANNEX 5 - HORIZON EUROPE CLUSTER 5

CLIMATE, ENERGY AND MOBILITY

1. Global Challenges and Their Drivers

The main objectives of this cluster are to fight climate change, improve the competitiveness of the energy and transport industry as well as the quality of the services that these sectors bring to society. This requires to better understand climate change's causes, evolution, risks, impacts and opportunities, and to make the energy and mobility systems climate- and environment-friendly, smarter, safer, more resilient, inclusive, competitive and efficient (minimising possible rebound effects). The overarching drivers are the need to decarbonise the energy and transport sector by 2050, while, at the same time, boosting their competitiveness – taking into account that both sectors represent an important share of GDP and jobs in Europe, that the transformation of these sectors offers tremendous business opportunities on a global scale, and that the services of both sectors represent major cost factors for businesses and households alike and are indispensable for the well-being and quality of life of citizens and the competitiveness of the European economy as a whole. Actions will therefore support directly EU policy priorities in the areas of climate, energy, and mobility, and contribute to creating more and better jobs, accelerating industrial transformation and generating innovation-based and inclusive growth.

Energy and transport sectors are vital for the European economy, for the mobility of people and goods and for affordable and sustainable energy supply for European citizens. Both sectors are the lifeblood of an integrated European single market, territorial cohesion and an open and inclusive society. At the same time, energy- and transport related activities cause the largest part of greenhouse gas emissions in the EU – the energy sector representing 54 %, the transport sector 24 % of EU greenhouse gas emissions in 2016⁹², so decoupling their environmental impacts from economic growth and achieving deep decarbonisation of these sectors is crucial. As evidenced by the long-term strategy, digitalisation and decarbonisation will transform both sectors in the coming decades, and they will be increasingly intertwined. At the same time, becoming a leading actor on fast expanding global markets for sustainable technologies and services is imperative for the European economy, and the energy and transport sectors in particular.

2. EU Policy Objectives

The EU has been at the forefront when addressing the causes and challenges of climate change and strengthening a concerted global response in the framework of the Paris Agreement. In this context, the European Commission presented in November 2018 its vision⁹³ for achieving net-zero greenhouse gas emissions by 2050. The long-term strategy outlines a vision of the technological, economic and societal transformations required to

⁹² <https://ec.europa.eu/eurostat/statistics-explained/pdfscache/1180.pdf>

⁹³ COM(2018) 773 final, A Clean Planet for all

achieve climate neutrality, and ensuring a socially fair transition that does not leave any EU citizens or regions behind.

R&I will determine the speed at which this transition can take place, directly affecting the associated costs, impacts and co-benefits, such as better air quality, increased employment, social inclusion, sustainable resource management, and reduced dependency on fossil fuels. The key to success is to develop a wide portfolio of cost-effective and efficient carbon-free alternatives for each GHG-emitting activity (including Life Cycle Analysis), often in combination with enhanced sector coupling, digitalisation and system integration. The rate at which European R&I actions succeed in developing, upscaling, implementing, and commercialising such innovative solutions will steer EU's future competitiveness of its existing and newly emerging industries.

In the medium term, the Energy Union Strategy provides the regulatory framework for achieving the EU's 2030 greenhouse gas emission reduction target – a decrease by 40% compared to 1990 levels⁹⁴ – in a cost-efficient way, including the EU Emission Trading Scheme, EU legislation and national targets. Sectoral EU legislation, such as the Clean Energy for All package and the Clean Mobility packages, imply major market transformation by 2030 in the energy and transport sectors. Horizon Europe can make a major contribution to bring more low and zero carbon technologies to market readiness and feed the innovation cycle with discoveries that may lead to disruptive solutions (including shift in user behaviour) in the longer term.

Coordination of EU instruments with private sector engagements and funding programmes within Member States is essential to accelerate transformation and maximise impact. In the energy area, the Strategic Energy Technology Plan (SET-Plan) helps align research and innovation between the private sector, the Commission and Member States. Similar guidance for the transport sector is provided by the Strategic Transport R&I Agenda (STRIA). As regards climate knowledge, JPI Climate provides a platform to align national research priorities according to a jointly agreed Strategic Research and Innovation Agenda (SRIA).

Activities in this cluster will contribute to multiple Sustainable Development Goals, with the most direct impact on SDG 7 (Affordable and clean energy), SDG 9 (Industry, Innovation and Infrastructure), SDG 11 (Sustainable Cities and Communities), and SDG 13 (Climate Action). In addition, SDG 3 (Good health and well-being), SDG 6 (Clean Water and Sanitation), SDG 8 (Decent work and economic growth), and SDG 12 (Responsible production and consumption) will be positively impacted.

3. Targeted impacts

The long term targeted impact of this cluster corresponds directly to the main objectives of fighting climate change while at the same time improving the sustainability and competitiveness of the energy and transport industry as well as the quality of the services that these sectors bring to citizens and society at large. Actions will aim to provide the basis for

⁹⁴ Additional targets are set for energy efficiency – an improvement of 32.5% by 2030 – and for renewable energy which should provide for at least 32% of the final EU energy consumption by 2030.

shaping the necessary technological, industrial economic and societal transformations to achieve climate neutrality in an inclusive and socially fair way and to contribute to creating more and better jobs.

The strategic plan focuses on targeted impacts across the various parts of the cluster. These include:

- Achieving an advanced knowledge base in climate science that can guide the development of required policy measures and low-and zero-carbon technologies essential to catalyse the transition to a climate-neutral emissions economy and society.
- New cross-sectoral energy/transport solutions enabling both the clean energy transition and the decarbonisation of transport.
- Achieve cleaner, more secure and competitive energy supply, notably by boosting cost performance and reliability of renewable energy solutions and by making the energy grid more flexible and secure.
- Support decarbonisation, create inclusive growth and employment in Europe, bring down costs for consumers and reduce our energy import dependency by developing energy efficient demand side solutions.
- Significantly contribute to net-zero greenhouse gas emissions and reduced air pollutants in and across all transport modes achieving at the same time strengthened global competitiveness of the European transport sector, through the development of new technological solutions in all transport modes.
- New, affordable smart, inclusive and sustainable mobility services which will result in significant safety, environmental, economic and social benefits such as reduced accidents, decreased congestion, reduced energy consumption and emissions of vehicles, increased efficiency and productivity of transport operations, improved working conditions and the creation of new jobs.

The desired impacts are further specified in the following section in relation to each priority.

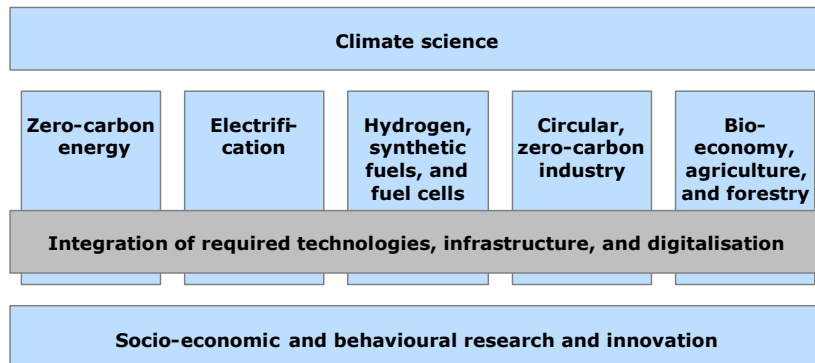
4. Key R&I Orientations

The energy and mobility sectors are closely interlinked and face many common challenges. An integrated approach is needed to maximise synergies and cross-fertilisation across these sectors. For example, research and innovation actions aiming at reducing cost for hydrogen generation and battery capacity – thereby fostering competitive European value chains – would bring pivotal change benefiting the clean energy transition and the decarbonisation of transport at the same time. Similarly, an integrated approach, encompassing energy, mobility (and other sectors), is essential making urban transport and energy systems more efficient and clean thus improving the quality of life in cities and communities. Cross-fertilisation between different industries can also lead to the emergence of new solutions to support the efficient transition to a net-zero greenhouse gas emissions economy.

Figure 3 illustrates the need to not only develop a wide range of advanced low and zero carbon technologies, but to organise R&I activities from a system perspective, by working on solutions (e.g. electrification, storage, zero carbon fuels, carbon neutral communities and cities) across sectors such as energy, transport, infrastructure, and buildings. Infrastructure, network development, digitalisation and skill development of the workforce are key enabling factors for decarbonisation, as well as to enhance security, safety and efficiency of the energy and transport system and the built environment. In addition, climate resilience and climate-

proofing of infrastructure help the EU with climate change adaptation and the related socio-economic transformation. Moreover, there is a need to optimise R&I activities from a value chain perspective, to support the circular economy and to reduce environmental footprint and pollution arising from different stages.

Relevant research and innovation areas for decarbonisation



To address the research and innovation challenges in the context of decarbonising the EU’s economy, the Horizon Europe proposal [2018/0225 (COD)] identifies a number of research and innovation priorities within the fields of climate, energy and mobility as follows:

4.1 Advance climate science and solutions for a climate neutral and resilient society

Challenge: The efficient transition to a resilient net-zero greenhouse gas emissions economy requires profound knowledge in various fields of research. Therefore, advancing climate science and creating a knowledge base that is user centric and can guide the development of policy measures and low- and zero-carbon technologies are essential to catalyse this transition. User guidance is important not only to support the mitigation of climate change but also to be prepared to adapt to its future and already felt impacts. Europe has been at the forefront of climate science and has to continue to deliver the knowledge to enable efficient decarbonisation pathways. Therefore, addressing this challenge will involve for example advancing efforts of the climate science community to perform research that furthers our knowledge, closes knowledge gaps (e.g. IPCC reports), developing the tools that support decision makers, and evaluating the societal impact of climate change and the technologies required for a low-carbon transition.

Targeted impact: Impact will be generated along three main research and innovation objectives. The first objective is to accelerate climate action (both mitigation and adaptation) uptake globally in line with the Paris Agreement and the SDGs, by improving knowledge of the climate-earth system and by proposing and evaluating solutions for short-to-medium and long-term systemic impact. The second objective is to contribute substantially to key international assessments such as the Intergovernmental Panel on Climate Change (IPCC) and the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES). The third objective is to strengthen the European research area on climate change.

Potential research challenges and topics⁹⁵:

⁹⁵ For all R&I areas, the planned activities should not be considered as comprehensive nor limitative

- Build a user-driven knowledge base (including state-of-the art climate projections and predictions at appropriate scales) that informs human response to global change;
- Produce actionable science and information management tools to share and engage with stakeholders and inform decision making;
- Design cost-effective net-zero greenhouse gas emission pathways compatible with long-term transitions and the Paris Agreement goals;
- Spearhead the development of climate services and decision-support tools and methodologies to inform adaptation decisions at local, regional, national and global levels, and evaluate adaptive capacities and limits;
- Incorporate and further advance research in social science and humanities, including behavioural science methodologies, integrated assessment modelling, and expertise to assess impacts, opportunities, challenges, incentives and requirements of action in support of a just transition (in synergy with cluster 2).

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions, with international cooperation wherever needed. The European High Performance Computing infrastructure can be an enabler for developing the next generation of climate models.

4.2 Cross-sectoral solutions for decarbonisation

The energy and mobility sectors are closely interlinked and face many common challenges. An integrated approach is needed to maximise synergies and cross-fertilisation across these sectors. For example, research and innovation actions aiming at reducing cost for hydrogen generation and battery capacity – thereby fostering competitive European value chains – would bring pivotal change benefiting the clean energy transition and the decarbonisation of transport at the same time. Similarly, an integrated approach, encompassing energy, mobility (and other sectors), is essential making urban transport and energy systems more efficient and clean thus improving the quality of life in cities and communities. Cross-fertilisation between different industries can also lead to the emergence of new solutions to support the efficient transition to a net-zero greenhouse gas emissions economy.

4.2.1 Establish a competitive and sustainable European battery value chain

Challenge: Electrification is one key technological pathway to decarbonise substantial parts of demand side sectors. In a world that is increasingly electrified, batteries will become a key technological component. In the road transport sector, affordable, durable, fast-charging batteries with high capacities are an indispensable enabler for large-scale deployment of electric vehicles. In short-distance waterborne transport, a switch to battery and hybrid propulsion would enable decarbonisation and a reduction in harmful emissions. We also need to assess the potential for long-term solutions for maritime transport and aviation. In the power sector, batteries can deliver various energy services and enable very high shares of intermittent renewable energy technologies. There is therefore an urgent need for the EU to invest in the development of an EU battery value chain based on beyond the state-of-the-art technology.

Targeted impact: To support the development of a world-class European R&I eco-system on batteries, by advancing the state of the art of battery technology in terms of material availability and recyclability, cost, performance, safety, user convenience, speed charging

and environmental (and carbon-) footprint along the value chain, with a view towards establishing a competitive, circular, and sustainable European battery manufacturing value chain.

Potential research challenges: The entire value chain should be covered from materials, electrochemistry, cells design (with a view to re-use, self-repair and recycling), cell manufacturing and cover both for mobile and stationary (e.g. redox flow) applications. Research topics such as innovative materials, advanced cell manufacturing, circular economy and recycling (cluster 4), batteries, battery management systems, safety and standardisation through pre-normative research should be integrated in this work stream. In terms of TRL levels, both enhancement of close-to-market Li-ion technologies, as well as new promising and longer-term break-through technological solutions⁹⁶ should be included.

Implementation: In order to develop a coherent, cross-cluster (e.g. for materials, manufacturing) and strategic battery research programme, and enhance leverage and industrialisation of research results, it is proposed that this strategic R&I area is developed through a co-programmed partnership with industrial players and the research community. International cooperation is key to improving the worldwide sustainability of the entire batteries value chain.

4.2.2 Strengthen the European value chain for low-carbon hydrogen and fuel cells

Challenge: Near zero carbon hydrogen and fuel cell technologies offer a major decarbonisation pathway for energy, transport and industry. Hydrogen offers significant potential for large-scale, long-term storage of renewable energy. There is a growing interest to use hydrogen in energy- and carbon-intensive industry, in particular the steel industry, for the direct reduction of iron ore in steelmaking, and in the chemicals sector as an important chemical feedstock. Hydrogen has started to be used as an energy carrier in the transport sector, in logistics and in the heating sector. In order to achieve large-scale deployment, major advances are needed to be achieved in terms of cost, performance and convenience for the supply, infrastructure and demand side technologies.

Targeted impact: Advancing the state of the art in terms of cost, performance, safety and environmental (and carbon) footprint will allow to the global leadership role of European industry along a competitive near-zero carbon hydrogen supply chain.

Potential research challenges:

- Near-zero carbon hydrogen production pathways (including using new materials), particularly renewable based, and including energy system integration aspects.
- Development of infrastructure for safe and cost-efficient transport, storage and provision of hydrogen and hydrogen-rich energy carriers, incl. long-term, large-scale storage of hydrogen as energy buffer.

⁹⁶ Preparatory actions on future battery technologies supported under the FET Flagships part of Horizon 2020 will feed the Strategic Planning process under Horizon Europe and inform the work on the partnership Batteries: Towards a competitive European industrial battery value chain (see Annex 7). ip

- Demand side technologies (including fuel cells) to produce power and/or heat for mobile and stationary applications. In the transport sector, focus on long range, heavy-duty road freight, rail, and water-borne⁹⁷.
- Life-cycle analysis for the design of hydrogen supply chains.

Implementation: Building on the existing Joint Undertaking, it is proposed that this strategic R&I area is implemented through an institutionalised partnership with strengthened industrial participation combining public and private financial resources across the value chain, to develop a coordinated pan-European approach. International cooperation will be established in particular through the Mission Innovation Challenge on Renewable and Clean Hydrogen. Synergies will be sought with the cluster ‘Digital, Industry and Space’ and cluster ‘Food and Natural Resources’.

4.2.3 Develop sustainable infrastructure, services and systems for smart and sustainable communities and cities

Challenge: With more than 80% of the EU's population living in urban areas it is essential to adopt new system approaches to (re)design our spaces/cities, incorporating regenerative paradigms with a focus on new energy & mobility systems with integrated mass transit, supported through user-friendly and secure digital services. Co-design and co-creation approaches with- and for society can help ensure uptake and deployment of solutions.

Targeted impact: Increase the overall energy and resource efficiency as well as the climate-resilience of Europe’s cities and communities and their attractiveness to businesses and citizens in a holistic fashion (including business and operating models, financing issues, public sector innovation, incentive structures and social innovation) by targeting mainly infrastructure (including green infrastructure), mobility services and energy systems. Improve air quality, resilience of energy supply, intelligent mobility services and logistics, liveability and accessibility of cities, comfortable and affordable housing as well as the exploitation of relevant European technologies and knowledge.

Potential research challenges:

- City/district energy systems and mobility towards the EU-wide deployment of low-carbon, Positive Energy Districts, Energy Communities and zero-emission mobility and logistics by 2050;
- Quality of life for the citizens through demand-based, accessible, inclusive and safe mobility and logistics, people's lifestyles and their impact on energy consumption and resources, urban social innovation, cities' and communities circular and regenerative capacity,
- Nature-based solutions and circular material, reduced life-cycle environmental footprint and pollution in cities;

⁹⁷ Hydrogen applications in aviation will be addressed separately in R&I related to aviation

- Urban land use and integrated planning, including governance and public sector innovation, urban policies, decision-making tools, new models for citizen participation;
- Next generation scalable interoperable digital infrastructure and software solutions for innovative services across different urban sectors (energy, mobility, water, urban planning, etc.), fuelled by latest ICT (Artificial Intelligence, Internet of Things, new computing paradigms, etc.) and (open) data governance models (including new business models). Robust and effective financing solutions and business models to increase investors' confidence.

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions, and/or as part of a potential cross-cluster Horizon Europe Mission in the area of 'Climate-Neutral and Smart Cities'. There is added value in bringing together EC-funded projects with large stakeholder platforms and the co-programmed partnership "Built environment and construction".

4.2.4 Foster emerging breakthrough technologies and climate solutions

Challenge: Although the contribution of a wide range of technologies to decarbonisation is already foreseeable, EU R&I programming should also leave room for unanticipated emerging and break-through technologies with a high potential for decarbonisation. Research in this area can be technological in nature but needs to be accompanied with assessment of environmental impact, social and economic impacts, and possible regulatory needs. Examples of such cases can be in the areas of: direct conversion of solar energy and artificial photosynthesis; solar-driven chemistry, direct air CO₂/methane capture and storage (DACCS); methane cracking; sustainable production of synthetic fuels from renewable energy; disruptive transport technologies, etc.

Targeted impact: The emergence of unanticipated and/or the sufficient development of emerging zero-greenhouse gas and negative emission technologies, including, in parallel, the assessment of their technological and economic potential, as well as their environmental impact, social acceptance and possible regulatory needs.

Implementation: This R&I priority will be implemented through a mix of non-prescriptive and open approaches, in order not to exclude relevant future frontier technologies and keep flexibility and more targeted support to highly promising emerging technologies at an early stage of development. Topics in this area should preferably be implemented through strong international collaboration, for instance Mission Innovation.

4.3 Develop cost-efficient, net zero-greenhouse gas energy system centred on renewables

The transition of the energy system will rely on reducing the overall energy demand and decarbonising the energy supply side. R&I actions will contribute to make the energy supply side cleaner, more secure and competitive, notably by boosting cost performance and reliability of a broad portfolio of renewable energy solutions and by making the energy grid more flexible so it can accommodate higher shares of renewable energy in a secure and flexible way. Innovative energy storage solutions can play an important role in this respect. To reduce CO₂ emissions from the power and energy-intensive industry sector, solutions for capturing, utilisation and storage of CO₂ (CCUS) will be matured. To accelerate technological progress along the value chain and maximise EU added value, EU support should be developed and implemented in synergy with national initiatives, leveraging actions

in support of the priorities and targets set by the EU's Strategic Energy Technologies Plan (SET-Plan) for its 10 Key Actions⁹⁸.

4.3.1 Achieve global leadership in renewable energy

Challenge: The EU long-term climate strategy highlights the pivotal role of renewable energies in the future energy system and the achievement of the zero-emission target. Renewables provide also major opportunities for the decarbonisation of other sectors such as heating/cooling, transportation and industry and their large scale and decentralised deployment will also improve security of energy supply and boost domestic jobs. While efficiency improvements for the more established renewables, such as wind energy, photovoltaics or bioenergy, are envisaged, a further diversification of the technological portfolio is also needed to support the clean energy transition. Renewable fuels, including synthetic and biofuels provide long-term solutions for the transport sectors, in particular for applications where fuels with high energy density are required, while at the same time help reducing the carbon footprint of these sectors in the long-term.

Targeted impact: To foster European global leadership in affordable, secure and sustainable renewable energy technologies and services by improving their competitiveness in global value chains and their position in growth markets, notably through the diversification of the renewable services and technology portfolio. To provide sustainable solutions for specific transport needs in aviation, shipping, or heavy duty road transport, for the heating/cooling sector, and in the heavy industry, within an overall circular economy concept in synergy with the bioeconomy.

Potential research challenges:

- Develop disruptive renewable energy and fuel technologies and systems, including the use of new materials, for existing and new applications and breakthrough solutions;
- Improve efficiency, competitiveness, sustainability of renewable energy and fuel technologies and their value chains (from cradle to recycling and final grave) to allow their scaling up in market and market penetration, thus securing energy independence;
- Develop flexible renewable-based solutions and fuels allowing high penetration in the energy system;
- Significantly expand renewable solutions and fuels in sectors other than power generation;
- Develop solutions to integrate renewables efficiently within the existing energy system infrastructure;
- Create synergies of bioenergy with bio-economy and other industrial sectors, in particular for new sustainable feedstock development and through the development of integrated bio-refineries.

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions. Actions on biofuels will need to be coordinated cross-cluster with

⁹⁸ <https://setis.ec.europa.eu/actions-towards-implementing-integrated-set-plan/implementation-plans>

activities of cluster 'Food and Natural Resources'. International cooperation with other technology leaders will be pursued where relevant (in particular through the Mission Innovation initiative).

4.3.2 Develop flexible, zero greenhouse gas emission and citizen-centred energy systems and grids

Challenge: Decarbonisation, cost-effectiveness and affordability, security and stability of supply and other objectives of the clean energy transformation depend on an efficient and effective network management and optimisation, leading to increased demand response and the ability to integrate higher shares of variable renewable energy (at all voltage levels). Exploiting synergies between different electricity, heating and cooling networks, gas networks, transport infrastructure and telecom networks will be crucial for enabling the smart, integrated and flexible operation of the relevant infrastructures.

Targeted impact: New approaches to manage smart and cyber-secure energy grids and related investments to enable more interaction and optimisation between producers, consumers, networks, infrastructures and vectors ensuring the cost-effective uninterrupted and affordable supply of energy to households and industries in a scenario of high penetration of variable renewables and other new low carbon energy supply.

Potential research challenges:

- Technologies and tools, including the use of Internet of Things and Artificial Intelligence, for electricity networks to integrate renewables and new loads, including flexibility solutions for managing electricity grids and Pan-European energy network management approaches, including improved cross-border cooperation in the transmission grid;
- New approaches and tools to empower market players, consumers and local energy communities (beyond smart meters);
- Solutions for the integration of energy systems and coupling of different energy vectors, networks and infrastructures, in the context of a digitalised and cyber-secure energy system, relying also on EU-specific technologies (e.g. encrypted Galileo services);
- Develop/demonstrate techniques to use gas infrastructure to transport low-carbon gases, including hydrogen;
- Integrated local energy systems, microgrids and modular solutions;
- Innovative grid services through demand response, storage and small-scale production of energy from renewable sources.

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions. Leveraging more investments and a better coordination with national funding programmes may require a partnership approach.

4.3.3 Develop carbon capture, utilisation and storage (CCUS) solutions for the power sector and energy-intensive industries

Challenge: Carbon Capture, Utilisation and Storage is a major CO₂ emission abatement that holds great potential for the power sector and especially for industries with high process emissions such as cement and steel. It is also an indispensable technology to allow the production of large volumes of zero-carbon ('blue') hydrogen from natural gas to kick-start

the decarbonisation of sectors such as steel or refineries, until sufficient renewable ('green') hydrogen becomes available.

Targeted impact: To accelerate the development of CCUS as a CO₂ emission mitigation option in electricity generation and industry applications. This includes CCS in combination with bioenergy (BECCS), resulting in 'negative' CO₂ emissions. It can also address the conversion of CO₂ to products either to replace the use of fossil fuel feedstock (i.e. production of synthetic fuels) or to store it for a climate-relevant time horizon (e.g. mineralisation), in collaboration with cluster 'Digital, Industry and Space'.

Potential research challenges:

- Development and demonstration of novel energy efficient, cost-effective and environmentally friendly capture technologies, including using new materials;
- Development of new storage sites (including operational best practices and public engagement);
- Feasibility studies for the development of CC(U)S hubs and clusters;
- Improving the CO₂ balance and energy performance of CO₂ conversion to value-added products.

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions, in particular with cluster 'Digital, Industry and Space' which includes industrial CCUS applications in the co-programmed partnership 'zero-carbon and circular industries'. International cooperation will be pursued both with other technology leaders (in particular through the Mission Innovation Carbon Capture Challenge) and with carbon-intensive technology followers to enhance the EU energy and climate diplomacy.

4.3.4 Develop flexible and efficient energy storage solutions

Challenge: Capturing excess electricity and heat to use it at a later point in time is an essential requirement for the cost-effective and secure transition of the energy system. Chemical, mechanical, electrical and thermal storage solutions will increase the flexibility of the energy system and complement the research and innovation areas of batteries (area 2.2.1) and hydrogen (area 2.2.2).⁹⁹ More than 50% of our energy use is thermal energy. Therefore, thermal energy storage enables a higher utilization of variable renewable sources in the heating and cooling sector.

Targeted impact: Advancing the technological readiness of centralised and decentralised energy storage for industrial-scale and domestic applications.

Potential research challenges: For energy storage, the research priority is to work on new, low-cost solutions (including the use of new materials) enabling to widen the scope and scale of application of storage technology. There is a particular need to:

- Develop more compact thermal energy storage for domestic applications of storage periods typically up to 4 weeks long;

- Re-design large-scale thermal energy storage for district heating and cooling in order to match the seasonal supply and demand of a large number of renewable sources on a district level;
- Develop more efficient electrical storage solutions (such as supercapacitors and superconducting magnetic energy storage);
- Develop novel mechanical storage technologies;
- Demonstrate the integration of different energy storage solutions in the grid;

Implementation: Potential research challenges and topics will be addressed via collaborative R&I. Actions will be developed in complementarity with other areas addressed in this cluster.

4.3.5 Leverage more public and private investments in clean energy systems

Challenge: All pathways to reach the clean energy transition require a better leveraging of public and private investments. Over the last decade, Strategic Energy Technology Plan (SET Plan) built platforms to align R&I agendas in dedicated areas stimulating Member States to coordinate national programmes and to pool funding across borders. Given the scale of the R&I investments needed, this leverage effect on public and private funding towards joint R&I activities in support of the clean energy transition should be intensified. The proposed co-funded partnership would deepen the trans-national integration in thematic areas of joint interest.

Targeted impact: Leverage public and private funding towards joint R&I activities and necessary accompanying measures in support of the clean energy transition, and coordinate national and regional research programmes with the aim to create trans-national integration in thematic areas of joint interest within the European Research Area.

Implementation: The proposed co-funded partnership would build on the work already carried out in the SET-Plan – i.e. definition of common targets and creation of Implementation Plans endorsed by Member States – and leverage public and private funding towards joint R&I activities. The proposed co-funded partnership would integrate the existing support into a larger, more efficient and more ambitious system.

4.4 Develop demand side solutions to decarbonise the energy system

Research and innovation actions aiming at fostering demand side solutions and improving energy efficiency are among the most cost effective ways to support decarbonisation, to create inclusive growth and employment in Europe, to bring down costs for consumers, to reduce our import dependency and redirect investments towards smart and sustainable infrastructure. The transition to a decentralised and decarbonised energy system will greatly benefit from the use of smart, digital technologies which will enable buildings and industrial facilities to become inter-active elements in the energy system by optimising energy consumption, distributed generation and storage and vis-à-vis the energy system. They will also trigger new business opportunities and revenue streams for up-graded, innovative energy services which valorise energy savings and flexible consumption. Active consumers will be able to benefit from cost reductions and from a bigger variety of services that contribute to a more comfortable, convenient and healthier living environment.

4.4.1 Empowering citizens to engage in energy markets

Challenge: Citizens are central to the successful development and uptake of low-carbon innovative solutions, from smart energy management and renewable energy generation in their homes to investments in large-scale wind farms. Finding new and better ways to involve Europe's citizens in the low-carbon transition, in the design / implementation of the policy measures, and for creating win-win situations for consumers and energy producers, network providers and investors is of critical importance. More involved citizens take greater responsibility for their own and the EU's energy security, promote sustainable finance in support of the energy transition and help devise novel and original business models.

Targeted impact: Reduce energy consumption and related emissions and increase demand-side flexibility in private households through new business models providing multiple user benefits and contributing to decentralised energy markets. Furthermore, socio-economic research should engage and empower citizens to participate in decision-making facilitating the transition to the energy system necessary to reach the EU's 2050 climate targets.

Potential research challenges:

- Develop technologies, services and business models for enhancing decision-making in home life and working life. This implies to move from awareness about the impacts of our consumption habits, lifestyles towards decisions and the adoption of sustainable practices at domestic levels;
- Develop and demonstrate technologies, tools and business models based on multiple (also non-energy) user benefits, for optimising the energy and resource flows within private households;
- Develop and enhance methods of citizen's engagement in long-term energy investment planning and energy transition policies. Develop new participatory models to engage citizens in investments of clean energy projects;
- Socio-economic and interdisciplinary research on re-qualification of workers currently in carbon-intensive sectors and building new employment opportunities targeted towards the needs of the clean energy transition.

Implementation: Potential research challenges and topics will be addressed via collaborative R&I, including citizen-science/user-led innovation approaches. A close cooperation with building and city related R&I initiatives across different parts of Horizon Europe will ensure complementarity. Actions will be closely coordinated with the Clean Energy Transition part of the LIFE programme (2021-2027) which focusses on policy support and market uptake action.

4.4.2 Achieving a highly energy-efficient and decarbonised EU building stock

Challenge: Buildings are pivotal to the energy transition and the achievement of a climate neutral economy. Energy consumption of buildings (in the operation phase) represents approximately 40% of energy consumption and 36% of CO₂ emissions in the EU. Enabling cost-effective energy renovation of buildings is a top R&I objective for the EU which can lead to significant energy savings and better life-cycle resource efficiency. This, together with enhanced interactions of buildings with the energy system and between buildings, opens up a significant decarbonisation and employment potential.

Targeted impact: Delivering the technology and socio-economic breakthroughs necessary to achieve the full decarbonisation of the building stock by 2050 through energy efficiency, renewables, digitalisation and smart operation of buildings, also bearing in mind the need to move towards climate neutrality in the longer term and to limit the life-cycle environmental impacts of buildings.

Potential research challenges:

This intervention area will primarily focus on the decarbonisation of buildings and on the contribution of the buildings sector to the clean energy transition, while also taking into account life-cycle perspective and circularity:

- Cost-effective renovation, including design and construction processes, and modernisation of existing buildings towards nearly zero-energy performance level, also taking into account environmental life-cycle performance;
- Digital tools for design, monitoring and optimisation of energy performance of buildings and technical equipment, taking into account life-cycle environmental performance, health, accessibility and comfort criteria, ensuring synergies with relevant policy initiatives (e.g. smart readiness indicator under the Energy Performance of Buildings Directive)
- Cost-effective integration of renewables at building - and neighbourhood - level, energy demand flexibility, integrated heat and electricity storage (including EV charging) and energy symbiosis (e.g. electricity and heat exchanges) with industrial zonings;
- Socio-economic aspects of innovation (e.g. business models, costs & affordability, accessibility, user behaviour and acceptance);
- Life cycle approaches integrating resource efficiency, circular economy and environmental impacts (e.g. biodiversity, natural resource depletion, new materials, carbon footprint).

Implementation: Potential research challenges and topics will be addressed through collaborative R&I actions. Synergies will be sought in particular with cluster 'Digital, Industry and Space' on activities relating to construction, construction materials and circular economy. Furthermore, cooperation with other cluster on life cycle approaches, optimisation of accessibility, safety, comfort, well-being and health in buildings will be essential and addressed in a co-programmed partnership on 'Built environment and construction'.

4.4.3 Support industrial facilities in the energy transition

Challenge: Industry has a key role in the clean energy transition, and also needs to become climate-neutral by 2050 while remaining competitive at global level. This needs to go hand-in-hand with an industrial transformation towards a circular industry. The efficient use of energy and resources will be optimised at all levels: at plant, industrial hub and energy system level. This priority, which focuses on the interfaces of the industrial plants and hubs with the wider energy system, will therefore be implemented jointly with Cluster 'Digital, industry and space' (cluster 4). Industry will switch to renewable and low-carbon energy sources, either produced locally or procured via electricity and gas (including hydrogen) grids. Through flexibility and demand response, industry will also contribute to the stability of energy grids supplied with a growing share of variable renewable sources.

Targeted impact: Enable competitiveness and carbon-neutrality of industry through the integration of renewable and low-carbon energy sources and the optimisation of energy flows across integrated industrial installations and the wider energy system.

Potential research challenges:

- Develop and demonstrate technologies, planning and modelling tools and infrastructure for optimising the energy flows (e.g. electricity, heat, Hydrogen) between industrial plants/hubs and the energy grids, so as to enable contribution to the integration of RES, energy efficiency and stability of energy grids;
- Develop and improve technologies to use industrial waste energy (heat, cold ...), including its conversion to other energy vectors, so that it can be re-commercialised in the energy system;

Implementation: Potential research challenges and topics will be addressed via collaborative R&I. To ensure complementarity across different parts of Horizon Europe, these will be addressed through, or in close cooperation with, industry-related R&I initiatives, notably with ‘Climate neutral and circular industries’ in Cluster ‘Digital, industry and space’.

4.5 Develop low-carbon and competitive transport solutions across all modes

Europe is world leader in transport design and manufacturing in all transport modes. The automotive, rail, aeronautics and shipbuilding sectors have a turnover of above EUR 350 billion and employ more than 3.6 million highly-qualified staff¹⁰⁰. At the same time, transport is a major producer of harmful emissions that contribute to climate change and affect air quality, particularly in urban areas. The transport sector is responsible for 23% of CO₂ emissions and remains dependent on oil for 92% of its energy demand. Furthermore, despite significant technological progress over past decades, projected GHG emissions from transport are not in line with the objectives of the Paris Agreement due to the expected sharp increase in transport demand. Intensified R&I activities are therefore needed, across all transport sectors, in order for the EU to reach its policy goals towards a net-zero greenhouse gas emissions by 2050 and to significantly reduce air pollutants. New technological solutions that will emerge from these efforts will not only contribute to the EU policy goals regarding fighting climate change, but will also enhance the global competitiveness of the European transport sector in all modes. These R&I activities are briefly described below.

4.5.1 Achieve zero-emission road transport

Challenge: The Clean Mobility package and in particular legislation on vehicle emissions implies that low and zero-emission vehicles will gain substantial market shares by 2030. In addition, improving air quality remains a key challenge in many cities and regions throughout Europe. To preserve and enhance Europe’s competitiveness in the automotive sector in this effort, in the face of increasing international competition, and to respond to societal challenges related to mobility, air quality and health, substantial R&I efforts are required focussing on the development of the next generations of zero- and low emission vehicles,

¹⁰⁰ “Towards clean, competitive and connected mobility: the contribution of transport research and Innovation to the Mobility Package” SWD (2017) 223 final

including clean road vehicles technologies and technologies of a more systemic nature, which will address the integration of clean vehicles and new system services into the transport system .

Targeted impact: The transformation of road transport to zero-emission mobility through a world-class European R&I and industrial system, ensuring that Europe remains world leader in innovation, production and services in relation to road transport.

Potential research challenges and topics: This priority will address both 1) clean road vehicles technologies (lightweight materials, drive trains, brakes, tyres, emissions after-treatment systems, power electronics, vehicle management systems and advanced and digital manufacturing technologies) and their infrastructure, including their interfaces, and 2) technologies of a more systemic nature, which will address the integration of clean vehicles and new system services into the transport system. All types of road transport vehicles are included (e.g. two-wheeler, passenger cars, vans, trucks and buses), as well as system integration with infrastructures and services.

Implementation: In order to develop a coherent and strategic R&I programme, and enhance leverage and industrialisation, it is proposed that this strategic R&I area is developed through a co-programmed partnership with industrial players and the research community, building on the existing European Green Vehicle Initiative.

4.5.2 Enhance the competitiveness of rail as a low-carbon mode of transport

Challenge: Pave the way for a major transformation of the railway system: focussing on decarbonisation, automation and digitalization. Moreover, address major issues at EU level, such as congestion, security of energy supply and retain the EU leadership role in producing innovative rail transport solutions.

Targeted impact: Achieve the Single European Railway Area as the backbone of an integrated and sustainable mobility in Europe and towards a globally competitive transport system, generating growth and jobs in Europe. Strengthen the EU leadership role in producing innovative rail transport solutions, and their integration into digital service chains.

Implementation: Building on the successful operation of the existing Joint Undertaking, potential research challenges and topics will be addressed via an institutional public private partnership.

4.5.3 Make aviation cleaner and more competitive

Challenge: The European Union is one of the leading exporters of aeronautics products in the world. Aviation is also a growing means of transport and a strong contributor to the European Union economy. Despite technological progress, GHG emissions from aviation are rapidly increasing, both in the EU and globally, making it one of the industry sectors with the highest need for new technological solutions to contribute to meeting the goals of the Paris Agreement. In addition, air pollution and noise levels need to be addressed. R&I is necessary to advance technologies as well as operational procedures of aviation to minimise the adverse environmental effects and maintain the EU's leadership position.

Addressing Aviation's Environmental Credentials

Targeted impact: To strengthen European aero-industry collaboration and maintain a global leadership position. To develop innovative, cutting edge projects accelerating the reduction of

all aviation impacts and emissions (noise, CO₂ and non-CO₂, including manufacturing and end-of-life). Technologies for deep decarbonisation will be developed in the field of aircraft technologies and standards, as well as the use of sustainable alternative fuels. It is envisaged that new technologies will provide for a potential fuel efficiency improvement of [XX%] for next generation aircraft technology, a potential decrease of [XX%] in aviation non-CO₂ emissions and major progress towards cost-competitive sustainable alternative fuels.

Potential research challenges:

- Better understanding the impact of non-CO₂ emissions, including cirrus contrails, NO_x, SO₂ on climate and environment;
- Reduce all aviation emissions and noise for increased environmental and health protection;
- Apply sustainable low carbon fuels (including synthetic fuels, hydrogen, and biofuels);
- Develop improved fuel efficiency for the next generation of aircraft technology;
- Research new aircraft configurations and new propulsion systems towards substantially enhanced performance;
- Deliver ecological and cost-efficient manufacturing, and end-of-life procedures;
- Promote strategic research activities in non-traditional aviation areas (e.g. electrification, digitalisation, autonomy, data-driven sciences, circular economy);

Implementation: Planned research challenges and topics can be best addressed through a dedicated institutionalised public private partnership, in order to maximise impact and the exploitation of synergies with a more efficient and transparent setup, stronger financial and nonfinancial commitments, potentially complemented through collaborative research projects. At least half of the budget will be allocated to technological solutions aiming at deep decarbonisation.

Air Traffic Management

Targeted impact: To overcome current shortcomings of the Air Traffic Management (ATM) systems, while addressing future challenges of digitalised and sustainable aviation. Continuing to develop the Single European Sky - tripling the capacity of the current ATM system, reducing its costs by 50%, increasing safety by a factor of 10, and reducing the environmental impact for each flight by 10%, from a 2004 baseline.

Potential research challenges:

- Develop solutions that address the capacity challenge and deliver safer, greener and more affordable aviation (Modernise and harmonise ATM systems in Europe);
- Address new priorities of the aviation ecosystem (e.g. cybersecurity, urban air-transport, U-space drone traffic management system).
- increased automation of ATM and aircraft, integration of the different systems (aircraft/ATM/airports).

Implementation: Building on the successful operation of the existing Joint Undertaking, planned research challenges and topics can be addressed via an institutionalized public private partnership.

4.5.4 Enable low-carbon, smart, clean and competitive waterborne transport

Challenge: In 2018, a global agreement was reached to cut total GHG emissions from shipping by at least 50% by 2050 compared to 2008, with the ambition of achieving zero emissions¹⁰¹. Shipping also contributes significantly to air and water pollution. Automation and information technology is revolutionizing the operations of inland and marine shipping, enabling new business models, increasing efficiency, improving security, developing new markets and supporting competitiveness.

Targeted impact: Accelerate the development and prepare the deployment of low-carbon and clean solution in the shipping sector, improve its system efficiency, enhancing digital and satellite-navigation solutions and contribute to the competitiveness of the European waterborne sector. Reduce environmental impact (on biodiversity, noise, pollution and waste management).

Potential research challenges:

- Increase the performance of hybrid/ full battery electric, fuel cell applications, propulsion systems with low-carbon fuels, on-board renewable energy and improved efficiency through changes in vessel design;
- Automation and digitalisation in maritime;
- R&I in Ports: alternate energy supplies and uses, floating ports, capacity management and sustainability in context of mega ships, port-city opportunities and integration of water freight and passenger solutions in spatial planning;
- Flexible manufacturing, increasing the competitiveness of production in shipyards, improving attractiveness of inland waterway transport and short sea shipping within integrated supply chains.

Implementation: Potential research challenges and topics will be addressed via collaborative R&I.

4.5.5 Reduce the impact of transport on the environment and human health

Challenge: Transport emissions are one of the main contributors to air quality problems, particularly in urban areas. At the same time, noise also negatively affects health. Electrification promises to address most of these issues, but as some transport modes are more difficult to electrify in the near future, there is need for R&I activities to in order to develop appropriate solutions.

Targeted impact: Improved scientific knowledge on the impacts of existing and new transport emissions, while at the same time devising ways of reducing emissions and their impacts, by technological or regulatory means, both at the source and once these emissions are in the environment.

Potential research challenges:

¹⁰¹ Initial IMO Strategy on Reduction of GHG Emissions From Ships
<http://www.imo.org/en/MediaCentre/PressBriefings/Pages/06GHGinitialstrategy.aspx>

- Deeper understanding of the impact of air polluting transport emissions and noise emissions on health and ecosystems;
- Develop/demonstrate solutions for the mitigation of these negative effects adapted to each specific aspect; quality of life and wellbeing of passengers and citizens;
- Methods to influence environmentally virtuous vehicle end user behaviours and discouraging negative ones (aggressive driving, tampering etc.), taking into account user needs and mobility changing requirements stemming from new forms/future of work; methods and tools to incentivise a change in citizen behaviour.

Implementation: Potential research challenges and topics will be addressed via collaborative R&I, in collaboration with cluster ‘Health’.

4.6 Develop seamless, smart, safe, accessible and inclusive mobility systems

Europe needs to maintain the competitiveness of its transport industry and manage the transformation of supply-based transport to demand-driven, safe and sustainable mobility services. Suitable research and innovation initiatives will help to prepare such transformation. Emerging digital technologies, such as Big Data, Internet of Things (IoT), artificial intelligence, and advanced satellite navigation services (Galileo/EGNOS) provide a great potential for developing connected and automated transport and managing traffic across the whole transport network. It can enable significant safety, environmental, economic and social benefits by reducing accidents caused by human error, decreasing traffic congestion, reducing energy consumption and emissions of vehicles, increasing efficiency and productivity of transport operations, improving working conditions, creating new jobs and contributing to social cohesion. To succeed in this transformation, Europe’s ageing transport infrastructure needs to be prepared for enabling cleaner and smarter operations. Research and innovation results will set the basis for future standards, creating European and global markets and adapting and modernising the overall regulatory framework. To maximise economic and societal benefits, in addition to technological solutions, it is essential to address human and social aspects such as: analysis of mobility factors and patterns, representations of different social groups and inclusiveness of new solutions, capacity building and public acceptance, etc.

4.6.1 Make automated and connected road transport safe and competitive

Challenge: Implement the goals for cooperative, connected and automated mobility on roads at EU and national levels as described in the Communication "On the road to automated mobility: An EU strategy for mobility of the future"¹⁰² and support the development and deployment of connected and automated, fully accessible mobility technologies, services and infrastructure.

Targeted impact: The objective is to bring societal benefits, strengthen the competitiveness of European industry and to manage properly the long transition phase towards a highly connected and automated transport system in a safe and secure way, favouring social

¹⁰² COM (2018) 283

inclusion, low emissions and overall efficiency (allowing for personal mobility while reducing overall environmental impact).

Potential research challenges:

- Interaction of automated vehicles with the surrounding environment, physical and digital infrastructure, interfaces with other transport modes;
- Technical enablers and Non-technical enablers: smart sensors, 3D HD maps, advanced satellite navigation/ positioning technologies, data-processing, artificial intelligence and connectivity, ethics, privacy, safety, security and cybersecurity accessibility liability, user and public acceptance, governance and international cooperation;
- Societal and environmental impacts of the automated road transport system (economic, environmental, social, training, qualifications, employment).
- Large-scale, cross-border demonstrations to get insights in the abilities of automated driving systems and their limitations and to enable deployment

Implementation: Planned research challenges and topics could be addressed through a dedicated institutionalised public private partnership, in order to maximise impact and the exploitation of synergies with a more efficient and transparent setup, stronger financial and nonfinancial commitments, in collaboration with cluster ‘Digital, Industry and Space’.

4.6.2 Develop efficient and innovative transport infrastructure

Challenge: Infrastructure innovation will be vital for implementing the TEN-T network and, more generally, in implementing the technological transition and efficiently limiting GHG emissions. Thus, there is a need to cater for the need for new solutions to ensure that despite increasing budgetary constraints, EU transport infrastructure can be maintained, upgraded and expanded to ensure competitiveness of the transport system while reducing unwanted impacts. Anticipating climate change is crucial for developing new types of innovative transport infrastructure for 2050, with an increasing challenge on its resilience and its environmental impact. Moreover, focusing on new transport modes and usages is a key to improve inter-modality and therefore improve the competitiveness and the quality of the services.

Targeted impact: Develop and validate new solutions to increase efficiency, inter-modality, resistance, safety and security of the transport system, for passengers and freight. At the same time, reduce greenhouse gas emissions from transport operations and improve the environmental performance of transport maintenance and modernisation works, over the entire lifecycle of the infrastructure. The infrastructure will have to withstand more frequent severe weather events by adapting to the climate change.

Potential research challenges:

- Develop and test new methods of transport maintenance and upgrade, with a view to improving safety, climate resilience and environmental impact (incl. habitat and biodiversity) and develop new solutions to accommodate connected mobility;
- Support the development of transport infrastructure which will accommodate new and evolving transport modes and improved integration (national, regional) of transport infrastructure and energy systems through deployment of relevant infrastructure;

- Integration of physical and secure digital infrastructure including aspects of cybersecurity;
- Develop tools for information and data collection and management to monitor the performance of the infrastructure (asset utilisation rate) and the efficient management of mixed vehicle fleets on road networks;
- Develop and test governance, regulatory, and public procurement models and new contractual performance indicators and incentives to maintain and upgrade infrastructure.

Implementation: Potential research challenges and topics will be addressed via collaborative R&I.

4.6.3 Develop the future transport network and integrated traffic management

Challenge: Lack of timely information, reliability, multimodal coordination, safety/security, passenger comfort and accessibility of collective mobility, exacerbated by inefficient freight traffic all lead to an increased use of individual transport by road. Overcoming system-wide capacity constraints will allow for better management of traffic streams for passengers and freight, enabling seamless door-to-door mobility and transport, resulting in an optimal traffic mix and circumventing temporary capacity limitations.

Targeted impact: Develop and prepare for deployment of an advanced multi-modal network and integrated traffic management system, in order to enable seamless door-to-door mobility, increase safety, reduce congestion and transport related emissions.

Potential research challenges:

- Architecture and concept of operations for an efficient, resilient and adaptable multi-modal network and traffic management (NTM) system, using advanced EU satellite navigation services
- Integration of service chains with cooperative and connected vehicles for improved traffic management and overall higher information percentage rate of mobile travellers.
- Validation of next-generation multi-modal NTM systems (including intra-modal optimisation and development of interfaces)
- Data sharing issues: use of data by different public / private stakeholders, need for rules and regulations;
- Traffic optimisation of conventional, (semi-) automated and unmanned vehicles within a multi-modal NTM system
- Enabling EU-wide co-modal freight transport services connected to global supply chains within a well synchronised, smart and seamless network.
- Inclusion of provisions for soft / active mobility (bikes + walking).

Implementation: Potential research challenges and topics will be addressed via collaborative R&I.

4.6.4 Enable multimodal freight logistics and passenger mobility services

Challenge: New mobility services are needed to improve opportunities for greater equity and accessibility for people who currently have few options. Public and private transport

operators are evolving their service models – blurring traditional demarcations between public transport and private mobility and across modes.

Targeted impact: Ensure European competitiveness in logistics and mobility services, while decreasing climate and environmental impact in line with the Paris Agreement. Develop and validate new, low-carbon approaches for the freight transport system and logistics operations over the entire lifecycle. Develop and validate people-centred, smart public transport and sustainable mobility services in all modes in rural and urban areas.

Potential research challenges and topics:

- New digital infrastructures and their interconnectivity and interoperability, to improve the efficiency of logistics chains;
- In the supply chain, the network capacity usage and management as well as synchro-modal services;
- Assess emerging business and operating models, their employment and social effects (e.g. need for upskilling and reskilling of the labour force), considering new digital and space technologies, vehicles (e.g. drones), new mobility patterns, and new global trends;
- Assess the impact and opportunities of cooperative, connected and automated mobility on multimodal freight logistics based on open platforms and standards/ data formats;
- Developing and defining new governance models for accessible, smart mobility services for all;
- Emerging demands through future interoperability of physical, technical, social (health, education, etc.), and spatial systems;
- Adapting the data/IoT eco-system to integrate new technologies from different sources (including non-transport) and to integrate new mobility demand (patterns).

Implementation: Potential research challenges and topics will be addressed via collaborative R&I, in collaboration with cluster ‘Digital, Industry and Space’.

4.6.5 Increase transport safety across all modes

Challenge: Safety is of primary concern for any transport system and the EU set ambitious targets in its 2011 Transport White Paper¹⁰³. Research and innovation will underpin the 3 pillars affecting safety - technologies, regulations and human factors (individual and organisational). The approach will be risk-based and systemic, including transport means, infrastructure, the physical environment (e.g. weather) and the various actors (e.g. manufacturers, regulators, operators, users etc.) as well as all their interfaces. Specific issues per transport mode and synergies across modes will be addressed.

Targeted impact: Contribute to drastically reduce accidents and incidents, fatalities and injuries and ensure that the EU is a world leader in safety in all modes of transport by furthering knowledge and awareness, and by developing technologies, products, services, and solutions that reconcile safety with efficiency and user-friendliness.

¹⁰³ COM(2011)145

Potential research challenges and topics:

- Understanding and predictive assessment of safety risks and system effectiveness;
- Accident scenario planning and post-accident response;
- Smooth interaction between all road users, their vehicles and infrastructure in a safe system approach;
- Technologies supporting monitoring and enforcement of current safety regulations, testing/preparation of future standards/rules
- New technologies and safety solutions
- Building and sharing safety data and knowledge on safety
- Situational awareness, rapid response systems

Implementation: Potential research challenges and topics will be addressed via collaborative R&I.

Overview of links between intervention areas (HE SP) and strategic R&I areas of the Strategic Plan document

X – strong link, o – link (less strong as for 'X')

Intervention areas as in Horizon Europe legal base	Climate Science and Solutions	Energy Supply	Energy Systems and Grids	Buildings and Industrial Facilities in Energy Transition	Communities and Cities	Industrial Competitiveness in Transport	Clean Transport and Mobility	Smart Mobility	Energy Storage
Strategic research and Innovation areas									
Develop knowledge and more efficient climate action									
Climate science and solutions	X		o		o		o		
Develop cross-sectoral solutions to decarbonise the energy and mobility sectors									
Batteries		X	X	X	o	o	X		X
Hydrogen		X	o	o		o	o		X
Communities and cities	o	o	X	X	X		o	X	o
Emerging breakthrough technologies and climate solutions	o	X	X	X	X	o	X	o	X
Develop cost-efficient, zero-carbon energy systems									
Renewable energy		X	X	o	X		o		o
Energy Systems and grids		X	X	o	X		X		X
CC(U)S		X		X					
Energy storage		X	X	X	X		o	o	X
Leveraging public and private investments in the Clean Energy Transition		X	X		X				
Develop demand side solutions to decarbonise the energy system									
Empowering citizens		o	X	X	X		o	o	o
Decarbonising building stock		o	X	X	X		o		X
Industrial facilities in		o	X	X					o

energy transition									
Develop low-carbon and competitive transport solutions across all modes									
Towards zero-emission road transport (2ZERO)			o	o	o	X	X		
Rail			o		o	X		X	
Cleaner and competitive aviation						X	X		
Waterborne transport		o	o		o	X	X	X	
Impact on human health and environment	0				o		X		
Develop seamless, smart, and safe mobility systems									
Mobility and Safety for Automated Road Transport					o	X		X	
Competitive and innovative transport infrastructure			o	X		X		X	
Future transport network and integrated traffic management		o	o		o	X		X	
Multimodal freight logistics and passenger mobility services			o		o	X		X	
Transport safety across modes						X	X	X	

5. European Partnerships

A partnership approach is used in case it will more effectively achieve objectives and targeted impacts than regular calls for proposals of Horizon Europe. Thus, European Partnerships shall be established for addressing European or global challenges only in cases where they will more effectively achieve objectives of Horizon Europe than the Union alone and when compared to other forms of support of the Framework programme.

The following areas for future partnerships with a lead under this cluster have been identified:

- Transforming Europe's rail system;
- Integrated Air Traffic Management;
- Clean Aviation;
- Clean Hydrogen;
- Built environment and construction;
- Towards zero-emission road transport (2ZERO);
- Mobility and Safety for Automated Road Transport (MOSART);

- Batteries: Towards a competitive European industrial battery value chain;
- Clean Energy Transition.

6. Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas;

- adaptation to climate change including societal transformation
- cancer
- healthy oceans, seas, coastal and inland waters
- climate-neutral and smart cities
- soil health and food

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

ANNEX 6 - HORIZON EUROPE CLUSTER 6

FOOD, BIOECONOMY, NATURAL RESOURCES, AGRICULTURE AND ENVIRONMENT

1. Global Challenges and Their Drivers

Human activities – driven by rapidly growing global population, unsustainable economic growth, production practices and consumption patterns – are creating mounting pressures on ecosystems (on land and sea) and on natural resources such as soils, water, air and biodiversity. Since 1970, the global demand for natural resources has more than tripled and is now exceeding “planetary boundaries”. Without radical changes in the current, linear modes of production and consumption, the demand for natural resources is projected to double between 2015 and 2050^{104,105}.

The continuous, accelerating decline in biodiversity is of particular concern as biodiversity provides the fabric of life with a range of ecosystems services which are crucial for human well-being¹⁰⁶. Main direct drivers of biodiversity loss, in order of their importance, are land use change, overexploitation (through intensive agriculture, forestry and fishing practices), climate change, pollution and invasive species. Underlying causes are production and consumption patterns, human population dynamics, trade, technological innovations, harmful economic incentives and governance¹⁰⁷. Currently, 27% of assessed species in the EU, in particular pollinators¹⁰⁸, and 66% of habitat types are threatened. Worldwide, about 1 million animal and plant species are now threatened with extinction, more than ever before in human history. The situation may become worse under the business as usual scenario¹⁰⁹. At the same time, transformative changes could bend the curve of biodiversity loss, but they are currently not happening quick, up-scaled or integrated enough¹¹⁰.

Natural resources, including biodiversity, are further degraded in terms of quantity and quality as a result of the impacts of climate change. If current trends continue, global average temperature increase could reach 2°C soon after 2060 and continue to rise afterwards, leading to major adverse impacts on primary production systems¹¹¹, natural systems and societies in rural, coastal and urban areas¹¹². On the other hand, effective management of land and natural resources whilst safeguarding biodiversity can enhance climate change mitigation and

¹⁰⁴ European Commission, Raw Materials Scoreboard 2018

¹⁰⁵ <http://www.resourcepanel.org/reports/global-resources-outlook>

¹⁰⁶ <https://www.ipbes.net/assessment-reports/eca>

¹⁰⁷ https://www.ipbes.net/system/tdf/spm_global_unedited_advance.pdf?file=1&type=node&id=35245

¹⁰⁸ EU Pollinators initiative COM/2018/395 final

¹⁰⁹ <https://www.ipbes.net/assessment-reports/eca>; <https://www.ipbes.net/assessment-reports/eca>

¹¹⁰ https://www.ipbes.net/system/tdf/spm_global_unedited_advance.pdf?file=1&type=node&id=35245

¹¹¹ Primary production systems include agriculture, forestry, aquaculture and fisheries

¹¹² <https://www.ipcc.ch/sr15/>

adaptation. Agriculture and forestry have a particular role to play in this respect as these sectors manage 80% of the land in the EU¹¹³.

Oceans, seas, lakes and rivers are the lungs and farms of our planet; they produce half of the oxygen we breathe and 16 % of the animal protein we eat. Yet, the health and productivity of our oceans, seas, lakes and rivers is severely endangered by climate change, ocean acidification, deoxygenation, excess nutrients, chemical pollutants and plastics and microplastics.

All in all, the global ecological footprint of human activities has increased from requiring less than one planet Earth in 1961 to more than 1.7 planet Earths today, and is expected to require two planet Earths around 2030¹¹⁴. Already now we are reaching or even crossing “planetary boundaries” of Earth system in a number of areas related to nutrient flows (notably nitrogen pollution and depletion of phosphorus) and biosphere integrity¹¹⁵. Accordingly, concerns over environment-related risks for the economy are mounting¹¹⁶.

These concerns are particularly justified for the EU economy, which is largely dependent on fossil resources and many raw materials sourced from international markets¹¹⁷. This when, as matter of fact, the mass-scale use of fossil resources has significantly contributed to anthropogenic climate change. Industrial operations represent about 20 % of the EU’s total GHG emissions, of which about half originates from the use of fossil resources as raw material and from industrial processes¹¹⁸. The use of biomass and waste for the production of renewable products (e.g., chemicals, materials) and nutrients has the potential to strongly contribute to breaking-down the dependence on non-renewable and mineral resources and act as an enabler of the overall bioeconomy.

Environmental degradation in conjunction with unsustainable production and consumption patterns pose also serious risks to human health and well-being. Pollution, responsible for 16% of all deaths worldwide, is the largest environmental cause of diseases and premature deaths today¹¹⁹. More than 70% of the diseases caused by pollution are non-communicable diseases (NCDs)¹²⁰.

Diets inextricably link human health and environmental sustainability. The prevalent unsustainable and unhealthy diets contribute to the global environmental change, and at the same time are the leading risk factor of NCDs and driver of obesity rates. Despite efforts, no EU country has reduced obesity rates in the last several decades¹²¹, and at present more than

¹¹³ https://ec.europa.eu/agriculture/sites/agriculture/files/cap-indicators/context/2016/c31_en.pdf

¹¹⁴ <https://www.footprintnetwork.org/our-work/ecological-footprint/>

¹¹⁵ <https://www.stockholmresilience.org/research/planetary-boundaries/planetary-boundaries/about-the-research/the-nine-planetary-boundaries.html>; <https://www.stockholmresilience.org/research/planetary-boundaries/planetary-boundaries/about-the-research/the-nine-planetary-boundaries.html>

¹¹⁶ In the last three years, the environmental-risks have dominated in the Global Risk Perception Survey; and in 2019 accounting for three of the top five risks for the economy by likelihood and four by impact. <https://www.weforum.org/reports/the-global-risks-report-2019>

¹¹⁷ <https://ec.europa.eu/eurostat/data/database>

¹¹⁸ Final Report of the High-Level Panel of the European Decarbonisation Pathways Initiative (EC, 2018) <https://publications.europa.eu/en/publication-detail/-/publication/226dea40-04d3-11e9-adde-01aa75ed71a1>

¹¹⁹ <https://www.thelancet.com/commissions/pollution-and-health>

¹²⁰ [https://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736\(17\)32345-0.pdf](https://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736(17)32345-0.pdf);

[https://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736\(17\)32345-0.pdf](https://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736(17)32345-0.pdf)

¹²¹ <https://www.sciencedirect.com/science/article/pii/S0140673614604608>;

<https://www.sciencedirect.com/science/article/pii/S0140673614604608>

half of the EU's adult population is overweight or obese¹²². The transformation to healthy and sustainable diets requires substantial dietary shift from the consumers and a change in the food production^{123,124}. There is a need to make food systems more responsive to the needs and interests of communities, and to empower people with a stronger influence in local food environments.

Moreover, in an ever-changing environment, keeping plants and animals healthy as well as food supply safe are ongoing challenges. Globally, every year pests and diseases cause around 20-40% of crop and animal production losses^{125,126}. Although the food supply in the EU was never so safe as today, the WHO estimates that food-borne bacteria, parasites, toxins and allergens cause about 23 million cases of illnesses and 5 000 deaths in Europe every year¹²⁷ and the European citizen is not fully confident or trusting the food supply systems^{128,129}. Continuous improvement of risk assessment and risk management methods is necessary to make sure that food stays safe at every stage of the food supply systems.

While addressing all these challenges comes at a price, the costs of inaction and related societal implications would be much higher¹³⁰. If left unaddressed, climate change and the degradation of natural capital risk to undermine public health and many economic sectors, which depend on the health of natural systems and resources. In this context, agriculture, forestry, aquaculture and fisheries, food industry, bio-based and other related sectors will be particularly affected, thereby jeopardizing food and nutrition security, millions of jobs, economic growth, and overall well-being of people, in the EU and globally.

The concepts of the circular economy, the bioeconomy, the blue economy and the Food 2030 initiative provide an opportunity to balance environmental, social, and economic goals and set human activities on a path to sustainability¹³¹. In addition to new knowledge, technological, innovation, organisational solutions and industrial transformation, implementation of these concepts requires profound changes in people's choices, lifestyles and behaviours as well as appropriate governance models from the local to the global. A transition to sustainable economic growth and competitiveness can only be successful if it goes hand in hand with increased prosperity and is inclusive. This implies a fair distribution of costs, benefits and risks along the value chains and balanced development of rural, coastal and urban territories in the Member States, across the EU and globally.

¹²² <http://www.euro.who.int/en/health-topics/noncommunicable-diseases/obesity/data-and-statistics>; <http://www.euro.who.int/en/health-topics/noncommunicable-diseases/obesity/data-and-statistics>

¹²³ <https://euagenda.eu/upload/publications/untitled-74063-ea.pdf>

¹²⁴ <https://www.thelancet.com/commissions/EAT>

¹²⁵ <http://www.fao.org/3/a-i6583e.pdf>

¹²⁶ http://www.oie.int/fileadmin/Home/eng/Media_Center/docs/pdf/Key_Documents/ANIMAL-HEALTH-EN-FINAL.pdf

¹²⁷ WHO (2015) Estimates of the global burden of foodborne diseases, p. 255;

https://apps.who.int/iris/bitstream/handle/10665/199350/9789241565165_eng.pdf;jsessionid=8B2AC517A05A7B81BE04E3AF4FC2EAA0?sequence=1255;

https://apps.who.int/iris/bitstream/handle/10665/199350/9789241565165_eng.pdf;jsessionid=8B2AC517A05A7B81BE04E3AF4FC2EAA0?sequence=1

¹²⁸ <https://www.sciencedirect.com/science/article/pii/S0924224418305557>;

<https://www.sciencedirect.com/science/article/pii/S0924224418305557>

¹²⁹ https://ec.europa.eu/info/consultations/public-consultation-transparency-and-sustainability-eu-risk-assessment-food-chain_en;

https://ec.europa.eu/info/consultations/public-consultation-transparency-and-sustainability-eu-risk-assessment-food-chain_en

¹³⁰ <https://hbr.org/2017/06/if-you-think-fighting-climate-change-will-be-expensive-calculate-the-cost-of-letting-it-happen>;

<https://hbr.org/2017/06/if-you-think-fighting-climate-change-will-be-expensive-calculate-the-cost-of-letting-it-happen>

¹³¹ The transition to a circular economy, including to a circular bioeconomy, is a huge opportunity to create competitive advantages on a sustainable basis. Applying circular economy principles in all sectors and industries will benefit Europe environmentally and socially and in addition have the potential to generate a net economic benefit of EUR 1.8 trillion by 2030(38), result in over 1 million new jobs across the EU by 2030. European Commission COM(2019)22 Reflection Paper "Towards a Sustainable Europe by 2030" https://ec.europa.eu/commission/sites/beta-political/files/rp_sustainable_europe_30-01_en_web.pdf

2. EU Policy Objectives

The EU has the ambition to lead the transition to a sustainable, climate-neutral, circular and environment-friendly economy in full compliance with the United Nations 2030 Agenda, the Paris Climate Agreement and the Convention on Biological Diversity, as reiterated in recent communications, notably “Clean Planet for All”¹³² and “Towards a Sustainable Europe by 2030”¹³³.

Many EU policies and strategies have been developed or reformed to foster the transition to an environmentally, economically and socially balanced future. This includes in particular: EU environmental legislation and policies targeting biodiversity, water, soil and air, the Common Agricultural Policy, the Common Fisheries Policy, the Maritime Policy, EU Arctic Policy, the EU General Food Law, the Circular Economy Package, the Circular Plastics Strategy, the EU Bioeconomy Strategy, the Blue Growth Strategy, the Food 2030 initiative, the new Industrial Strategy Policy and the 2030 Climate and Energy Framework.

Research and innovation (R&I) is crucial to better understand the underlying drivers of the sustainability challenges as well as to devise options and a range of solutions to address them. It needs to be matched with investment in technologies, new business and governance models as well as social and environmental innovation to overcome lock-ins and set humanity on more sustainable pathways. Accordingly, R&I can play a key role in achieving objectives set in relevant EU policies and global commitments. These include: meeting the goals of sustainable development, mitigating and adapting to climate change, guaranteeing the production and consumption of safe and healthy food and bio-based products, promoting sustainable practices in agriculture, aquaculture, fisheries and forestry, ensuring access to clean water, soil and air for all, achieving the good environmental status of the seas and oceans, preserving and restoring the planet’s vital natural ecosystems and environment.

This is expected to foster an innovative, responsible and competitive European economy generating sustainable jobs and growth.

3. Targeted impacts

R&I in the Cluster 6 aims to advance knowledge, build capacities as well as develop and demonstrate innovative solutions that will accelerate the transition to: a sustainable and circular management and use of natural resources ensuring ecosystem integrity as well as sustainable development and human well-being, including food and nutrition security, in the EU and globally. This will involve user-driven exploitation of environmental big data sources (in particular from Copernicus and Galileo). R&I activities under this Cluster shall create the following interlinked, long-term impacts:

- Reduction of greenhouse gas emissions and successful adaptation of ecosystems and production systems as well as rural, coastal and urban areas to climate change

¹³² COM(2018) 773 final, A Clean Planet for all A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy; https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_en.pdf; https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_en.pdf

¹³³ Reflection Paper “Towards a Sustainable Europe by 2030” https://ec.europa.eu/commission/sites/beta-political/files/rp_sustainable_europe_30-01_en_web.pdf; https://ec.europa.eu/commission/sites/beta-political/files/rp_sustainable_europe_30-01_en_web.pdf

The climate mitigation and adaptation potential of terrestrial, seas, oceans and inland waters ecosystems as well as primary production, food and bio-based systems will be seized. In particular, GHG neutral and climate-proof production and consumption will be enabled. Negative GHG emissions through sink and storage functions provided by ecosystems and sustainable bio-based resources, materials and products will be actively enhanced. As a result of actions under this Cluster in cooperation with Cluster 4 and 5, European climate targets will be achieved, notably a cut of at least 40% in greenhouse gas emissions (from 1990 levels). In the longer term this will enhance economic, environmental and social resilience.

- Halt of biodiversity decline and restoration of ecosystems

Biodiversity and ecosystem services in natural systems and in primary production will be better understood, monitored, valued and managed. As a result, the decline of biodiversity, including of pollinators, will be reversed and ecosystem integrity and resilience in land and aquatic environments enhanced.

- Sustainable and circular management and use of natural resources; prevention and removal of pollution; healthy soils and clean water and air for all; attractive jobs, enhanced value creation and competitiveness

The physical and biological planetary boundaries in relation to the use and management of biodiversity and natural resources on land and sea will be better understood and defined. This will provide the basis for a more circular use of resources and the mainstreaming of circular systems. As a result, resource efficiency will be increased and pollution will be reduced all along value chains, from production to consumption and disposal. The resource-efficient management and sustainable use of biological resources will result also in increased added-value along the whole value chains and their competitiveness as well as more attractive jobs in rural, coastal, peri-urban and urban areas. Sustainable management of water resources will help to better cope with the impacts of floods and droughts and reduce the high economic costs related to water pollution control and removal.

- Establishment of primary production, food and bio-based systems based on sustainability, inclusiveness, health and safety; food and nutrition security for all

Sustainable, low emission, resilient, competitive and equitable primary production and food systems will become the norm. The potential of aquatic production systems and aquaculture to produce sustainably high quality food and biomass will be unlocked. Imbalances in our food value chains will be corrected, from agriculture and fishing, to the food and drink industry, transportation, distribution, and consumption. Safe use of bio-resources from land and sea will be ensured. Sustainable, safe and healthy diets will be available and accessible for all and a major shift to healthy diets from sustainable food production systems will be achieved.

- Behavioural, socio-economic and demographic change are well understood and drive sustainability; a balanced development of vibrant rural, coastal, peri-urban and urban areas

Behaviour, motivation, lifestyle and choices of producers and consumers will be better understood. Citizens, as consumers, as producers, as entrepreneurs and as innovators will have equitable access to knowledge and skills required for making informed choices and being actively engaged in sustainable management of natural resources, from production to consumption and disposal. Healthy and responsible production and consumption will become the norm. Mobilising the forces of digital transformation and socio-economic innovation will facilitate those changes and foster a balanced and interlinked development of rural, coastal, peri-urban and urban areas.

- Establishment of governance models enabling sustainability

Policy design, implementation and monitoring will be supported by strong evidence-based knowledge and tools. Innovation systems will be in place and encourage multi-actor, participatory, risk-aware, place-based innovations which in turn will accelerate the development and adoption of sustainable practices. Solid and reliable information from Environmental Observations will allow better understanding of impacts of global changes and enable sound decision making by public authorities. The EU's and international science-policy interfaces will be strengthened to achieve a global impact on the transition to sustainability.

4. Key R&I Orientations

The present section describes the most important short to medium-term impacts that are expected from R&I orientations under each area of intervention. The short and medium-term impacts of R&I orientations will be key for achieving the long-term impacts outlined in the previous section. As the challenges and impacts under this Cluster are highly interconnected, systems-based approaches will be encouraged. This implies encouragement of multi-actor involvement as well as interdisciplinary or even transdisciplinary approaches in the R&I orientations.

4.1 Environmental Observation

This R&I orientation will support the Commission and the European Union with Environmental Observation-based information and data in the domains of the global science challenges.

The disruptive technologies emerging in the digital economy offer many opportunities in the field of Environmental Observation to deliver information for EU strategy and policies in bio-economy, food, agriculture, natural resources, and the environment.

The main challenge in this area of intervention is to deliver more reliable and standardised information, building on the FAIR (findability, accessibility, interoperability, and reuse) principle, to better understand the impact of global changes and to feed into sound decision making on the big challenges our society faces (links with all the Clusters and AI's in Cluster 6).

The objectives will be reached through facilitating the sharing and integration of environmental data and information collected from the large array of observing systems contributed by countries and organisations within the Group on Earth Observations (GEO). This includes space-based (Copernicus and other space missions), airborne, in-situ and citizens' observations, e.g. through EU platforms such as the European Open Science Cloud (EOSC), the Copernicus DIAS and the European Marine Observation and Data Network (EMODnet) (links with Cluster 4 (Space) and AI4). The approach will also include developing algorithms, using big data and AI (machine learning) to detect and analyse Earth System-relevant information (e.g. in the biosphere), as well as by empowering citizens to contribute to environmental observation and achieve a broader citizens' engagement.

This R&I orientation of work will aim to fill in situ observational gaps and deliver effective solutions for the sustainable use and monitoring of food and natural resources through Environmental Observation, contributing to the Agenda 2030 on sustainable development.

Impacts on the short term consist of better facilitated access to existing ground environmental information through European and global repositories. Furthermore, these efforts will lead to

improved time series and geographical coverage of ground environmental observations for e.g. the ocean, Polar regions, and urban and peri-urban areas. It will deliver strengthened partnerships connecting environmental observation with application development groups in the field of food and natural resources, to provide integration knowledge for decision making and resource management. It should lead to upgraded planetary observation systems integrating European systems and benefiting to European users (links with Cluster 4 (Space)). And this should end up in improved European Big Environmental Observation Data Processing/storage facilities connected to the European Open Science Cloud (EOSC).

This area will support Earth system science activities in relevant domains in the context of climate change and biodiversity, such as the Intergovernmental Panel on Climate Change (IPCC) and the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES). This includes monitoring to support the implementation of EU nature, climate and agricultural legislation and the EU biodiversity strategy as well as contributions to the delivery of a more sustainable agriculture under the Common Agricultural Policy (CAP) (links with Cluster 5 and AI2, AI3 and AI5).

This area of intervention will support models and data assimilation for the development of indicators, scenarios, service capacity, and innovation. This will be done for many topical fields including biodiversity, species and ecosystem health, climate mitigation and adaptation (including GHG flux monitoring), food security and food safety, agriculture and forestry, land use and land use change, marine and water conservation and use, urban and peri-urban development, renewable energy and natural resources management. It will furthermore support risk assessment and evidence-based policy for ensuring resilient, secure and safe environment-based systems, including farming. It will look into areas of ecosystem resilience, including tipping points, risk prone areas and disaster risk reduction (links with Cluster 3, Cluster 5 and AI2, AI3, AI4 and AI5).

This area of intervention is related to most of the missions and many of the proposed partnerships, in particular, but not exclusively to the partnership ‘Agriculture of data’ (Environmental Observation for a Sustainable EU Agriculture).

4.2 Biodiversity and Natural Capital

This R&I orientation will support research, innovation and investment activities to guide the development of new methodologies, technologies and solutions, appropriate policy design, and behavioural and economic change to enable the protection, restoration and sustainable management of ecosystems and natural capital.

Biodiversity and natural capital are essential for mitigating and adapting to climate change. To enhance this potential, inter-relations between biodiversity, ecosystem services and climate change mitigation and adaptation, including carbon sequestration dynamics from land and sea, must be better understood (in collaboration with IA4). EU R&I will contribute to accelerate the uptake of ecosystem-based approaches and nature-based solutions to climate mitigation and adaptation, to restore fully functional ecosystems so that they can play their role as carbon sinks contributing to the aims of the Paris Agreement, and explore complementary action in digital, regulatory framework and standards, market, investment, insurance, behavioural and socio-economic areas.

A better understanding of biodiversity and ecosystem services, and impacts of their decline, will mobilise capacities and investments for their conservation, restoration and sustainable management, also through in-situ research across ecosystem types, and thus facilitate the continued provision of all ecosystem services, which underpin our economy and society.

This includes addressing the drivers of biodiversity loss and their interactions – land use change, overexploitation (through intensive agriculture, forestry and fishing practices), climate change, pollution and invasive species, and their underlying causes (production and consumption patterns, human population dynamics, trade, technological innovations, harmful economic incentives and governance) – their temporal, sectoral and spatial effects, the development of solutions to mitigate their impacts and the promotion of practices that enhance biodiversity (together with IA3 and 4). Essential tools that will be developed and improved are projections/forecasts, integrated models, scenarios and pathways that integrate socio-economic value, behavioural and bio-physical factors for biodiversity conservation and restoration, including tipping points and planetary boundaries.

Assessing and valuing biodiversity, ecosystem services and nature-based solutions, and supporting the development and adoption of natural capital accounting frameworks and metrics will support their mainstreaming in public and private decision-making. A necessary pre-condition for efficient biodiversity action is investment into long-term integrated monitoring frameworks and associated tools, including new technologies and approaches (together with IA1), to monitor trends and dynamics of drivers of change and of biodiversity and ecosystem services.

The crash of insect populations calls for a better understanding of its causes and to look for solutions to mitigate its effects on ecosystem functioning and their impact on citizens' life. EU R&I will in particular focus on the role of pollinators in the integrity of ecosystems and the availability of their services, which should help to prioritise and better integrate pollinators into habitat conservation plans and strategies, as called by the EU Pollinators initiative (together with IA3).

Better understanding of the links between pollutants and human health, well-being and ecosystems are needed to develop systemic approaches tackling them (with IA3, IA4, IA5 and Cluster 1). Innovative nature-based solutions will be developed and tested to reduce pollution and revitalise degraded ecosystems and reverse biodiversity decline, notably man-made ones as well as human health. There are still significant gaps in the knowledge of environmental behaviour and eco-toxicological features of chemical compounds and mixtures. Their characterisation could be related to questions on human toxicology and exposure (Cluster 1).

Assessing how extraction, production, consumption, trade, and behaviour patterns, especially primary production and food systems, affect biodiversity loss and ecosystem services, and how ecological transitions can be socially fair is a priority. Better understanding on how measuring and valuing natural capital changes the public and private decision making at all levels is needed, including for business and investors, and for exploring solutions to improve the biodiversity impact of retailers in global value chains. Impacts of digital transformation, new emerging technologies and social innovation on biodiversity need to be addressed. This includes maintaining materials in the economy for as long as possible and comprehensive assessment methodologies for nature-based solutions in business and for social justice (performance indicators, standards, reference models, risk analysis, life cycle assessment). A robust science and evidence base will in turn contribute to EU coordinated action on the sustainable finance action plan, so as to shift investment towards more biodiversity-friendly activities.

Development of innovative governance models, participatory approaches and integrated decision-support tools are expected to enable systemic approaches and a swift

implementation of policy actions for meeting sustainability, biodiversity and climate challenges set towards 2030. Successful transition to sustainability requires an agreement in the communities on the preferred options for development beyond the identification of feasible options to address an acute problem. Multi-stakeholder living labs that allow co-creation of systemic solutions and create space for testing them are innovative governance solutions that implement the ‘innovation principle’ not restricted to biodiversity and natural capital in the strict sense but address transition processes more broadly. Related activities aim at understanding behavioural, socio-economic and demographic change as drivers of sustainability and catalysts for a balanced development of vibrant rural, coastal, peri-urban and urban areas. Science-based tracking mechanisms and methods would enable transparent assessment of their effectiveness. Activities will engage communities of innovators, public authorities, business and public in all parts of the science-policy cycle, including through citizen science, for facilitating co-creation of actions on natural capital and biodiversity.

Another targeted impact is the improved science and knowledge base, science-policy mechanisms and tools to support the workings and outcomes of IPBES and IPCC and multilateral environmental agreements (see international cooperation).

4.3 Agriculture, forestry and rural areas

Sustainable, climate-friendly and resilient farming and forestry systems provide a number of economic, environmental and social benefits. In addition to contributing to food and nutrition security, feeding into dynamic value chains, providing millions of jobs and securing well-being of people, EU’s farmers and foresters are important stewards of the natural environment, and thus have significant potential to shape and maintain rural landscapes, promote healthy ecosystems, mitigate the effects of climate change and halt the loss of biodiversity. EU research and innovation activities under this intervention area are expected to advance knowledge, build capacities and develop solutions to use land in more sustainable ways and to move to climate-friendly and resilient agriculture and forestry systems. This transition will be supported by applying principles of agro- and forest ecology and making better use of ecosystem services. R&I will also contribute to providing consumers with healthy and nutritious food, developing new value chains and to a balanced development of rural areas, based on implementation of effective, evidence-based policies.

Fostering climate change mitigation, and achieving sustainable management and efficient use of natural resources implies for agriculture and forestry that there is a right balance between productivity, climate and environmental goals. R&I will unlock the full potential of LULUCF¹³⁴ activities in the mitigation of climate change. New technologies and business models will further enable a “de-fossilisation” of land-based primary production (in cooperation with Cluster 4 and 5, and IA2). Results of funded activities will benefit forest management and the delivery of multiple services provided by forests, such as the provision of goods, the protection of soils, water and biodiversity or their contribution to climate change adaptation and mitigation.

A range of approaches will be developed to enhance resource use efficiency in agriculture and forestry, find alternatives to scarce resources such as water and decrease the dependency

¹³⁴ Land Use, Land-Use Change and Forestry (LULUCF), for more information see: https://ec.europa.eu/clima/policies/forests/lulucf_en:

on critical raw materials (together with IA5 and Clusters 4 and 5). A better understanding of the nutrient flows and the role of biodiversity as well as a more effective integration of legume crops in farming systems will allow to optimise nutrient management and reduce pesticide use on-farms and across landscapes, thereby also decreasing pollution of water, soil and air from primary production. By better linking rural, peri-urban and urban resource flows it will be possible to gain value from residues and by-products, unlock the potential of the circular economy, and hence create attractive jobs in rural communities, in particular by promoting small-scale, bio-based solutions (in cooperation with IA6) and innovations in farming at the interface between agriculture, aquaculture and forestry.

Agriculture and forestry are severely affected by more variable and extreme weather events and there is an urgent need to foster adaptation of primary production to climate change. R&I outputs are expected to increase the resilience of plants and animals to biotic and abiotic stresses by bringing more diversity into farming and forestry systems and provide farmers with better-adapted crop varieties and animal breeds. Moreover, R&I outputs will provide solutions for rural communities to mitigate and adapt to changing climatic conditions, in particular by introducing innovations in the areas of renewable energy, mobility and natural disaster prevention (together with Cluster 3 and 5).

Biodiversity and ecosystem services underpin productivity and resilience of agriculture and forestry; their preservation and restoration at farm, forest and landscape level is therefore essential. Increased knowledge on the benefits of biodiversity-rich and pollinator friendly practices will serve to develop farming and forestry systems that protect, restore and enhance agrobiodiversity, wild biodiversity and ecosystem services across a range of scales. The planned partnership “Accelerating farming systems transition: agro-ecology living labs and research infrastructures” will support implementation and upscaling of agro-ecological approaches in primary production, including organic and mixed farming or agroforestry. R&I outputs will improve conservation, management and use of plant and animal genetic resources, thereby preserving and enhancing agrobiodiversity. Furthermore, results delivered by R&I will allow to better assess the impacts of primary production on biodiversity, identify the ecological boundaries of the bioeconomy and deploy nature-based solutions to enhance biodiversity (in cooperation with IA2).

Health and safety in agriculture and forestry, and of their produce, as well as animal welfare are important societal concerns. Addressing these concerns will require a multidisciplinary and systemic approach. Results of R&I under this orientation are expected to enhance capacities to prevent, monitor and control animal and plant pests and diseases including emerging risks. This will result in the development of safe and environmentally friendly methods for plant protection and weed control that substantially reduce the use of contentious pesticides, and thus also enhance the health and well-being of workers in agriculture and forestry, of consumers and of ecosystems (in cooperation with Cluster 1). With regard to improving animal health and welfare, activities will result in a better understanding environmental and socio-economic drivers of diseases and promote innovative integrated approaches to animal production. The planned partnership “Animal health: fighting infectious diseases” will tackle transboundary animal diseases, anti-microbial resistance and will allow to advance in the implementation of the One-Health concept (in cooperation in Cluster 1).

Knowledge on structure and functioning of food and non-food value chains will support the creation of new value chains, in particular for a wide range of eco-innovative products of high quality based on plant proteins, fruit and vegetables that meet growing consumer demand for healthier and more sustainable diets (in cooperation with IA5 and Cluster 1). R&I

results will contribute, in particular, to the development and strengthening of the EU-grown plant protein¹³⁵ and organic sectors¹³⁶. They will improve the organisation of value chains and stimulate collaboration among farmers, producer organisations and other actors. This will ultimately lead to greater diversity, transparency, efficiency and competitiveness, more added value and balanced power relations across the whole food and non-food value chains (in cooperation with IA5).

The socio-economic and demographic changes in rural areas jeopardise the cohesion of the EU territory. Results of R&I will feed into strategies and policies to close the divide between rural and urban areas and benefit vulnerable groups, rural dwellers (in line with Cork 2.0 Declaration) and generational renewal in farming and rural communities (in cooperation with Cluster 2). The development of digital services and skills as part of the digital transformation will enhance connectivity of often remote rural areas (including mountain areas) and support smart rural communities and businesses (in cooperation with Smart Villages and POSEI, and Cluster 4). This will result in a better understanding of social networks, social capital and social innovation processes and allow for innovations in rural communities which valorise local and regional assets as well as improve well-being of people living in rural areas (in synergy with the LEADER programme).

To develop governance models for sustainability, R&I is expected to deliver the necessary data and knowledge base for improving monitoring and evaluation of EU policies addressing agriculture, forestry and rural areas in the period 2021-2027 and beyond. They are expected to deliver foresights and tools for multidisciplinary assessment of sustainability and circularity, lock-ins and transition pathways. Moreover, observation networks of European forests are expected to be created and data related to forests harmonized.

Agricultural knowledge and innovation systems (AKIS) as well as social innovation will be key drivers to speed up the take-up of results. This will include promoting place-based innovations, reinforcing the multi-actor approach and establishing a network of living-labs in agro-ecology.

Due attention will be given to ICT as an enabler, allowing to build an open digital environment and supporting bottom-up innovation in agriculture, forestry, related value chains and rural areas (together with IA1 and Cluster 4). This is in line with the recent declaration of EU Member States on “Smart and sustainable digital future for European agriculture and rural areas”¹³⁷.

4.4 Seas, Oceans and Inland Waters

Seas, oceans and inland waters have a central role in climate processes and in the provision of food, biodiversity, critical ecosystem services, renewable energy and other resources. Oceans, seas and inland waters can deliver more food with lower carbon and freshwater footprints than land-based production, while boosting profitability in the sector. Crucially, the ocean economy needs to prepare for and adapt to alterations in the marine ecosystem – notably from climate change and ocean acidification – requiring integrated management frameworks

¹³⁵ Report from the Commission to the Council and the European Parliament on the development of plant proteins in the European Union (COM(2018) 757 final).

¹³⁶ <https://ec.europa.eu/info/food-farming-fisheries/farming/organic-farming/future-organics>

¹³⁷ <https://ec.europa.eu/digital-single-market/en/news/eu-member-states-join-forces-digitalisation-european-agriculture-and-rural-areas>

leading towards win-win outcomes for the ocean economy and the ocean environment from Antarctica to the Arctic. Furthermore, the health of the ocean, its conservation and protection are a prerequisite to benefit from the ecosystem services.

Contributing to the above, science, technology and innovation are key to the development of a sustainable ocean economy, along with skills and education, ensuring that by 2030 the potential of oceans, seas and inland waters, their ecosystems and bioeconomies to drive a healthy planet is fully understood, unlocked and harnessed.

Designing and deploying an integrated approach (looking at the interlinkages of ocean-climate, ocean-food, ocean-land, ocean-society, renewable energy from marine sources, marine biodiversity, etc.) will lead to systemic solutions that by design respect the health of seas and oceans and planetary boundaries. Knowledge and innovative solutions will support evidence-based policy making and implementation through engagement and dissemination actions and assessment at EU and global level¹³⁸.

Climate change mitigation and adaptation will be enhanced through the improved scientific knowledge and innovations that will allow to better understand, forecast, monitor the ocean and its changes (including sea level), the climate-ocean interface and the impact of stressors and global changes on ecosystems and maritime sectors¹³⁹ as well as on inland waters and related economic activities and human settlements. The development and demonstration of Greenhouse gas "neutral" and climate-proof production and exploitation innovations will contribute to climate neutrality and support the adaptation of fisheries, aquaculture and sustainable exploitation of ecosystem services and other resources in the context of climate change and other global changes (in cooperation with Clusters 3, 4 and 5).

Preservation and restoration of biodiversity and ecosystem services will benefit from increased understanding of marine biodiversity and other biological resources, marine ecosystems, planetary boundaries and ecosystem services at sea and in coastal areas¹⁴⁰ (together with IA2), including fisheries for the sustainable use and management of natural resources at sea, environmental protection, coastal management, food security and food sovereignty. The development and demonstration of the use of ecosystem-based approaches and other systemic solutions will allow to protect and sustainably use and manage marine biological resources and to enhance ecosystem integrity and resilience in marine and coastal environments.

Sustainable management of inland water, coastal and marine resources will be achieved through innovative solutions (including circular economy business models and social innovations – together with IA7) to reduce stressors and human induced pressures on freshwater and marine ecosystems and human, algal and animal health, facilitating the development and market uptake of sustainable circular bio-based processes and blue bioeconomy products.

¹³⁸ EU policies such as the Common Fisheries Policy, the revised EU Bioeconomy Strategy, the Integrated Maritime Policy (including the Marine Strategy Framework Directive), Maritime Spatial Planning and International Ocean Governance as well as the 2050 Clean Planet vision.

¹³⁹ Investigate the impacts of climate change on marine and coastal ecosystems, examining effects in terms of ocean acidification, sea level rise, temperature and currents changes, extreme events, deoxygenation, eutrophication, abundance of marine resources and food, and other effects on marine sectors;

¹⁴⁰ This includes research needs from the ongoing negotiations on Biodiversity in Areas Beyond National Jurisdiction (BBNJ)

Contributing to global food and nutrition security, will be realised through developed and demonstrated solutions to produce more, safe, healthier and better quality food, and by exploiting new food sources from the seas, oceans and inland waters, whilst conserving biodiversity, thus alleviating pressure on land and fresh water resources and boosting profitability in the sector. This will go hand in hand with sustainable and resilient aquatic food production systems that minimise the use of chemical inputs, nutrients and antimicrobials, and guarantee the transparency and traceability of aquatic food products (together with IA5).

Establishment of governance models enabling sustainability will benefit from the results of R&I, improving capacities and skills to reap the benefits of digital transformation and socio-economic innovations for more resilient, prosperous, sustainable and dynamic inland water, coastal and maritime economies, also by developing management frameworks aligned to policy objectives and ensuring fit for purpose ocean observations¹⁴¹ (together with IA1), interconnected with relevant research infrastructures¹⁴², to serve the needs of decision and policy making.

Prevention of pollution (chemical, physical, bacteriological, nutrients) and required behavioural and socio-economic changes will be addressed through R&I leading to solutions to limit pollution in inland, coastal and marine waters from maritime infrastructures and transport, energy infrastructures and tourism and by demonstrating adoption of circular economy products to prevent and mitigate littering and polluting. Special attention will be given to the river catchment areas and the quality of the cleaned waste water entering coastal waters.

Cost-effective solutions for mitigation of morphological alterations of water bodies (e.g. barriers, dams, canalisation) and for restoration and management of heavily modified water bodies will help to preserve and restore biodiversity and ecosystems. Innovative solutions, improved analytical tools and monitoring methods to address the negative effects of past chemical stressors and new emerging pollutants (such as micro-pollutants, micro-plastics, pharmaceuticals) will also help improve the chemical status of freshwater and prevent further pollution, both in inland water bodies and coastal waters (in cooperation with IA7).

A planned overarching partnership “A climate neutral, sustainable and productive Blue Economy” will cut across several of the above impact areas and it will have a key role in achieving the desired impact on a sustainable Blue Economy, creative value added, blue growth and jobs in Europe through a jointly supported R&I programme in the European seas, coastal and inland waters.

Multi-lateral cooperation with international partners will be pursued to achieve the goals mentioned above, notably in the Atlantic, the Mediterranean, the Black Sea and the Arctic.

¹⁴¹ Technologies for the digital ocean (seafloor, water column and water surface) connecting services and communities, and promoted through the Blue Cloud as part of the European Open Science Cloud.

¹⁴² Such as those identified by the European Strategy Forum for Research Infrastructures (ESFRI) and those established under the European Research Infrastructures Consortium (ERIC) regulation

4.5 Food Systems

The global food system is facing a range of challenges including the triple burden of malnutrition (undernutrition, over-nutrition and micronutrient deficiencies), climate change, resource scarcity, biodiversity loss, including in soils, growing and ageing population, urbanization, food waste and food poverty. This requires food systems' transformation with a shift towards more sustainable and healthy diets aiming to ensure food and nutrition security for all. Food sector is also an important part of the European bioeconomy market in terms of turnover and employment at 50% and 19% respectively¹⁴³. The Food 2030 initiative will support the transition with a systemic approach to make our food system future-proof.

A better understanding of the interactions between the different components of the current food systems will accelerate the transition towards a sustainable, climate-neutral, resource-efficient, trusted and inclusive global food system from land and sea that respects planetary boundaries and delivers safe, healthy and affordable food to all. Innovative solutions and strategies that tackle systemic issues and have high social, environmental and economic impact will play an essential role. R&I will contribute to promoting sustainable and healthy diets; preventing the risks of non-communicable diseases; building the food safety systems of the future; ensuring a more diverse and sustainable protein availability; reducing food waste and rethinking packaging; valorizing the potential of new microbiome knowledge; realizing urban food systems transformation; and building on digital innovations in a coherent food system approach.

To foster climate change mitigation and adaptation, R&I solutions will be developed to improve resource efficiency and circularity, to reduce food waste, rethink packaging and address environmental pressures impacting on the food systems. Results of R&I will provide a diverse range of more sustainable and nutritious foods, such as plant based proteins, algae, seafood and insects based proteins, and improve the climate-resilience of food systems. Placed based food innovation will be supported and R&I solutions applied also in urban and rural contexts to ensure the transformation of urban and peri-urban food systems.

The food systems is an important part of the bio-economy, it draws on the services of the same ecosystems whose limits have to be respected. For the preservation of biodiversity and ecosystem services and resources food systems have to create synergies with the bioeconomy, notably for the better use of byproducts and wastes. Sustainability, inclusiveness, safety and health will be embedded in food systems and food and nutrition security ensured. Innovative personalized nutrition solutions will provide a better understanding of needs and predispositions to develop tailored solutions for different targeted groups and in particular for people in vulnerable stage of life to reduce the incidence of diet related and non-communicable diseases (in cooperation with Cluster 1). The potential of the microbiome will open new avenues to improve human health, biodiversity of food resources, sustainability and climate resilience across food systems (in cooperation with Cluster 1 and IA3). Addressing health and nutritional inequalities is crucial to reduce hunger and malnutrition and to support the sustainability transition. Innovative solutions and strategies tackling the causes of food and nutrition insecurity and identifying emergency responses at different levels (cities, regions, etc.) and for different communities (developing countries,

vulnerable groups like elderly, migrants, low income groups), will ensure that nutritious, sustainable and safe food is available, accessible, and affordable for all, and at any time (in cooperation with Cluster 1, Cluster 2 and IA3). Challenges to and innovation in the food chain will be addressed by improved risk assessment methodologies and new evidence to support robust food safety regulatory frameworks, including new and emerging food safety risks. R&I will foster solutions for acceptability, trust, transparency, and innovation uptake by citizens. The development of digital innovation will optimize the sustainable use of natural resources along the food system and contribute to foster food safety, crisis management, traceability, transparency and system resilience, to respond to the trend for more personalized, sustainable and healthy food, and to increase EU food industries competitiveness. R&I solutions for food products, services and process will optimize nutritional, structural and functional food properties, food systems sustainability and resources efficiency, reduction and recycling of water, food loss and waste, and the reduction of plastic based food packaging.

Behavioral, socio-economic and demographic changes will be well understood and drive policies. R&I solutions to better understand the factors (such as urban planning, obesogenic environment, cultural and socio economic factors) influencing consumer food choice, their lifestyle and their motivation with a special attention to vulnerable people will facilitate transition towards sustainable and healthy production and consumption. Safe and healthy diets will not only reduce the risk factors of diet-related and non-communicable diseases, but is essential for reaching climate targets¹⁴⁴ and supports more environmental friendly production systems. European food industries should be involved as they have an essential role to play in facilitating dietary change by providing good quality, safe, affordable and convenient food with good nutritional (e.g. functional food adapted to different target groups) and sensorial qualities.

Citizen's empowerment and involvement in informal governance systems will be crucial to shift consumer preferences and consumption pattern towards more sustainable and healthy diets. Interfaces between informal and formal governance systems need to be developed and tested to accelerate innovations uptake in society. To develop and establish governance models enabling sustainability, R&I will produce knowledge and innovative solutions to support evidence-based policy-making, implementation and monitoring and to strengthen EU and international science-policy interfaces for improved governance. By addressing political and socio-economic lock-ins starting from the local level of governance, these solutions will ensure policy coherence and societal engagement in developing and applying science-based innovative solutions.

The contribution of the proposed partnership on "Safe and sustainable food systems for people, planet and climate" will cut across several of the above impact areas and will have a key role to support food systems transformation including post-harvest food production and sustainable and healthy diets.

¹⁴⁴ COM(2018) 773 final, A Clean Planet for all and SWD: Dietary changes can by 2050 reduce EU GHG emissions equal to 5% of 1990 levels

4.6 Bio-based Innovation Systems

Bio-based innovation has a major role to play in the transition to an economy which is climate neutral, circular and operates within planetary boundaries. Building on the use of biological renewable resources, as a substitute for fossil- and mineral-based ones, it fosters climate neutrality in very significant parts of European industrial and economic sectors (e.g. construction, packaging, textiles, chemicals, cosmetics, pharma ingredients and consumer goods). It contributes to achieving the goals of the Circular Economy – for instance through the development of our capacity to turn organic waste into valuable products. At the same time, it capitalises on the enormous advances of biosciences and biotechnology to deliver greener and innovative products, processes and services. The transformative potential of bio-based innovation will also be directed towards economic competitiveness (in cooperation with Cluster 4 for industrial symbiosis), delivering new value chains, technologies and processes, economic activities and employment, thus revitalising regional economies and local areas.

The contribution of bio-based innovation to fostering climate change mitigation and adaptation strongly relies on the provision of sustainable biomass, grown in a way which respects climate and biodiversity goals and sustains ecosystems integrity, and its conversion into bio-based products and nutrients as a substitute of fossil and mineral-based ones.

R&I is expected to deliver on two main outcomes. First and foremost, it will result in resilience and sustainable biomass production systems for high value bio-based products while ensuring the functions of balanced ecosystems (terrestrial, aquatic) with greater carbon sequestration and biodiversity conservation. A number of ecological approaches can be considered such as multi-cropping strategies, ‘agro-forestry’, multipurpose biomass, the use of perennials and marginal lands, residues mobilisation and use as well as climate-resilient crops (e.g. drought, pathogen resistant) (in cooperation with IA3). Secondly, it will pursue the establishment of new bio-based value chains through the development of a toolbox of solutions to process diverse biomass into bio-based products, including in advanced sustainable biorefineries, including small-scale decentralised models (in cooperation with IA3). A key approach will be the combination of sustainability and functionality of the developed products. Bio-based products may be suitable for various (longer-term) uses, and new end-of-life requirements (such as recyclability, compostability), should show lower toxicity on the environment (e.g. bio-based surfactants, pesticides, insecticides) or present new functionalities (e.g. drugs based on chemical composition or structure) or performances (biodegradability in specific environments) meeting societal needs.

Coupled with its potential to reduce greenhouse gas emissions, bio-based innovation can accelerate the transition from a linear fossil-based economy, which leads to overuse and depletion of natural resources, into a resource efficient and circular bio-based one operating under safe planetary boundaries. R&I is expected to result in solutions to keeping the value of biological resources in the economy for longer through the optimisation of product design, production processes, performance and end-of life, including reuse and recycling patterns. Effective approaches will be devised to the increase of the value generated per unit of biological resources. They could range from the optimisation of the chemical (complex molecules), materials and energy potential of the feedstock to the implementation of the principle of cascading use of biomass. Greater value will also be generated from unavoidable biological wastes and residues, including urban bio-waste and residues from agriculture, food processing, forest sector, fisheries and aquaculture. Also the recovery of nutrients from waste streams to produce bio-based fertilisers will allow for reducing impacts associated to the production and use of synthetic fertilisers. As bio-based products and processing may

decrease the presence of hazardous substances, they could improve safety and facilitate circularity. Industrial symbiosis will enable the creation of new value chains and networks where wastes or by-products of an industry or industrial process become the raw materials for another. This includes the capture and use of CO₂ from emissions from bio-based processing into valuable chemicals, materials and products. The flows of biological resources will be better integrated into models of the circular economy, in particular on the circular use of natural resources that account for its ecological boundaries and enhance biodiversity and the delivery of ecosystem services, and metrics and data on the value generated per unit of biological resources will be developed.

With a view to addressing the previous R&I priorities (in cooperation with IAs 3, 4, 5 and 7), the suitability of the establishment of a potential European partnership in the area of “Sustainable, inclusive and circular bio-based solutions” will be assessed against the compliance of a possible proposal with Horizon Europe selection criteria and targeted impact.

Bio-based innovation is not only driven by the need to address pressing societal challenges (such as climate change, resource depletion, biodiversity loss, environmental pollution) but also by the disruptive potential of the unprecedented advances in life sciences and biotechnology. This goes far beyond biomass processing towards allowing the use of nature’s “biological assets”, i.e. its functions and principles. R&I is expected to deliver competitive, sustainable and novel industrial processes, environmental services (e.g. bioremediation for restoring ecosystems, water resources, soil) and consumer products through the application of biotechnologies across bio-based value chains (e.g. chemistry, construction). When coupled with the digital revolution, new tools will be put in place for prospecting, understanding and sustainably using the biological resources (in cooperation with IA 2).

Maximising the impact of bio-based innovation involves the elaboration and establishment of governance models enabling sustainable and inclusive bioeconomy patterns. This key targeted impact cuts across all key R&I priorities identified above. R&I is expected to deliver behavioural and socio-economic change resulting in (i) the revitalisation of local communities through e.g. new (small-scale) business models and innovative contractual arrangements in value chains, (ii) effective public engagement, mobilisation and mutual learning, trust building and awareness raising, (iii) training and skills development as well as recruitment strategies and education. R&I is expected to result in a deep understanding of multiple boundaries of the bioeconomy. This includes knowledge for evidence-based policy making on (i) bioeconomy impacts, synergies and trade-offs with a healthy environment, enabling their comparison with concurrent and alternative economies (fossil-, CO₂-based), (ii) (international) biomass sustainability criteria and certification schemes, (iii) hierarchy of use of biological and fossil resources (e.g. trade-offs and synergies with food production or other land use). Technological, as well as systemic, territorial, social and environmental innovation will be supported.

4.7 Circular Systems

The recent EC report on the implementation of the Circular Economy Action Plan, the EU Plastics Strategy, the updated EU Bioeconomy Strategy, the reflection paper towards a Sustainable Europe by 2030 and the Clean planet for all strategy acknowledged the need for further progress in scaling up circular economy, reducing pressure on the environment and consolidating the competitive advantage it brings to EU businesses. There is need to: (i) continue supporting research, innovation and investments to develop and demonstrate innovative systemic solutions in various sectors (e.g. plastics, food, textiles, electronics, construction and built environment) and reap their full benefits to cut greenhouse emissions;

(ii) address the challenges related to the circular use of natural resources, including recycling, energy and material efficiency; (iii) support new circular business models, and consumption and production patterns; (iv) enhance circularity and sustainable water use and circular nutrient and manure management; (v) develop appropriate indicators and governance systems to measure the progress and accelerate the transition to the circular economy.

Improved knowledge about the potential and the overall environmental impact of circular economy will contribute to reducing GHG emissions along value chains and to fostering mitigation and adaptation to climate change. Investing in systemic solutions for circular economy at regional and local scale (in urban, peri-urban, coastal and rural regions) including new business models, products and services stimulating resource efficiency along the whole value chain, while exploring the potential of digitalisation, will contribute to reducing the environmental footprint of production and consumption, preventing pollution and achieving sustainable management and circular use of natural resources. The development of a holistic view of a working after-use system in particular for plastic based products, incorporating reuse, collection, sorting, mechanical, chemical and organic recycling will also provide insights on how to coordinate strategically the transition towards a circular economy for plastics and other key material flows and support the implementation of relevant EU policies.

Robust approaches to promote active engagement of citizens, to explore the consumer-related aspects of circular economy and identify instruments that can trigger changes in consumer behaviour and make circular economy socially acceptable and inclusive, will be essential to accelerate the transition to circular systems for the sustainable management and use of natural resources. R&I solutions will improve knowledge and develop metrics and indicators for measuring material flows, the circular economy and life cycle performance, governance systems to accelerate expansion of circular economy, including models for multi-stakeholder and cross-value chain collaboration, incentives and financing instruments.

Climate change will require adapting water management to increased scarcity and flooding, as a result of more extreme weather events. Improved knowledge about the status of waterbodies and about long-term change in resources are essential for adaptation. Innovative solutions for the restoration of degraded water bodies and water reuse systems contribute to maintaining natural capital. Transparent water allocation systems to satisfy all needs are essential for sustainable resource use. New governance solutions that build on better spatial planning, based on environmental observation, better modelling and inclusion of citizen and economic actors, like insurances, will be essential to support EU water and climate adaptation related policies (in cooperation with cluster 5).

The ecological consequences of imbalances in the nutrient cycles are visible as eutrophication of surface waters and as contamination of sub-surface waters with increasing costs for drinking water provisions. Forest areas are also affected and get lost for the production of animal feed. Nutrient emissions cause also impact on air, biodiversity, climate and soil. A comprehensive EU policy to balance nutrient cycles is not yet very well developed. Research and innovation is needed to look at how the EU could move to living within the safe nutrient planetary boundary. Research and innovation activities related to the nutrient cycle shall include inter alia more sustainable sourcing of nutrients for example from wastes, alternative soil management, and livestock emissions and recovery of recycling of nutrients for different industrial sectors. Analysis of emissions from relevant sectors, nutrient budgets, and key actions to be taken to close nutrient cycles across all environmental media will be developed. Innovation activities may develop and test better governance arrangements through stakeholder involvement for the realisation of a nutrient policy on local and regional levels.

Actions to develop and demonstrate systemic solutions for a sustainable management of nutrients flow in Europe will enhance sustainable, inclusive, safe and healthy primary production and food systems.

5. European Partnerships

In the area of Cluster 6 the landscape of Horizon 2020 partnerships is characterised by a high share of public – public partnerships. Among those partnerships, two are institutionalised ones (Bio-Based Industries and PRIMA). With a view to rationalise the landscape, the following eight areas for future partnerships have been identified, The specific nature of some of the identified challenges make partnerships a useful means for implementation. This is notably the case if a structured cooperation with already existing broad stakeholder networks is required to create impact from a strategic research and innovation agenda; or if partnerships with a network of public R&I funding agencies can create synergies. The following areas for partnerships with centre of gravity in this Cluster are proposed:

- Towards more sustainable farming: agro-ecology living labs and research infrastructures
- European Partnership on Animals and Health
- Environmental Observations for a sustainable EU agriculture (Agriculture of data)
- Rescuing biodiversity to safeguard life on Earth
- A climate neutral, sustainable and productive Blue Economy
- Safe and Sustainable Food Systems for People, Planet & Climate
- European Partnership for a Circular bio-based Europe: sustainable innovation for new local value from waste and biomass
- Water4All: Water security for the planet

EIT Knowledge and Innovation Communities (KICs). In addition to the support to the abovementioned European Partnerships, the Cluster 6 will collaborate with relevant EIT Knowledge and Innovation Communities (KICs). Thanks to their societal challenge-driven approach and their portfolio of activities, ranging from entrepreneurial education and training, to innovation projects, business creation activities and support services for start-ups, scale-ups and SMEs, the EIT KICs, in particular, EIT Climate-KIC and EIT Food, are well equipped to develop synergies and complementarities with Cluster 6 activities. ‘Water and maritime’ has been proposed a potential theme for a future EIT-KIC and EIT might support in future the KIC in coordinated cross-KIC actions in challenges, like the circular economy, that are so far addresses at the margins of several KICs.

The Standing Committee on Agricultural Research (SCAR) is an established advisory committee for the coordination of research and innovation addressing large parts of this Cluster and has played a key role in identifying R&I orientations in this field for many years. The continued use of the SCAR advisory committee is key to achieving the targeted impacts of Cluster 6.

6. Missions

One of the main novelties of Horizon Europe is the introduction of missions; high-ambition, high-profile initiatives which will put forward concrete solutions to challenges facing European citizens and societies. Missions are currently in the process of being defined within five areas;

- adaptation to climate change including societal transformation

- cancer
- healthy oceans, seas, coastal and inland waters
- climate-neutral and smart cities
- soil health and food

Accomplishing missions will require a cross-cutting approach, drawing on research and innovation activities defined not only through individual Clusters, but across Horizon Europe and beyond. Research and innovation activities within this Cluster thus have the potential to support missions in all of the above-mentioned areas. The synergies between each mission and cluster will be further explored as possible missions take shape.

7. International Cooperation

The EU is party to the UNFCCC¹⁴⁵, to the UNCCD¹⁴⁶ and to the UNCBD¹⁴⁷ (“the Rio Conventions”) and has taken commitments under this framework to limit global warming (lastly under the Paris Agreement), to achieve land degradation neutrality and to halt biodiversity loss. In 2015, the EU committed to the 2030 Agenda for Sustainable Development. Through successive Framework Programmes the EU supports and contributes to the work of the IPCC¹⁴⁸ and to the IPBES¹⁴⁹, in terms of providing scientific evidence and science-policy-society interfaces.

At the same time major efforts have been put into strengthening access to environmental observation and data through the Global Earth Observation System of Systems (GEOSS) with the involvement by the European Commission as a co-chair of the Group on Earth Observations (GEO)¹⁵⁰, in order to underpin environmental policies and global commitments (SDGs, Sendai Framework and Paris Agreement).

Global challenges are global in nature and require global commitments. Therefore, international cooperation will be stepped up through strategic alliances in areas, such as food and nutrition security, animal health, soil, climate change, water management, ecosystem restoration or forest management. This will not only involve bilateral cooperation, but also multilateral cooperation, through existing networks, such as the Belmont Forum, the Bio-economy Forum or the establishment of international research consortia¹⁵¹ (IRCs). The establishment of one IRC is expected in the area of soil and carbon.

The development of an EU-African Union Research and Innovation Partnership will be continued in areas such as food and nutrition security, sustainable agriculture (FNSSA) and climate resilience. The continuation of the partnership FNSSA in Horizon Europe is a response to the level of hunger in Africa, expanding nutritional imbalances, and the need for agriculture and food production systems to sustainably respond to rising demand.

¹⁴⁵ UN Framework Convention on Climate Change <https://unfccc.int/resource/docs/convkp/conveng.pdf>

¹⁴⁶ UN Convention to Combat Desertification <https://www.unccd.int/>

¹⁴⁷ UN Convention on Biological Diversity <https://www.cbd.int/>

¹⁴⁸ Intergovernmental Panel on Climate Change <https://www.ipcc.ch/>

¹⁴⁹ Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services <https://www.ipbes.net/>

¹⁵⁰ [GEO Mexico City Declaration](#); [GEO Strategic Plan 2016 - 2025](#)

¹⁵¹ IRCs are flexible platforms that allow coordination of global efforts in a specific area. The IRC Star-Idaz, supported by Horizon 2020 focuses on animal health.

Cooperation with China as part of the Food, Agriculture and Biotechnology (FAB) task force will continue on priority themes of mutual interest.

International cooperation with Brazil and the wider CELAC region will be encouraged on nature-based solutions, ecosystem restoration and natural capital in order to support relevant EU policies and partnerships, notably addressing the objectives of the UNFCCC, the CBD, the Sendai Framework, Habitat III and the Sustainable Development Goals

Leading international cooperation activities in the field of water will be also promoted with a view of supporting relevant EU policies and partnerships and water diplomacy. Also cooperation for all European sea basins will be key to achieve the strategic objectives for seas and oceans, particularly through the All-Atlantic cooperation and the cooperation for the Mediterranean.

The EU will continue to work with international partners to step up science, research and innovation in all European sea basins to underpin international ocean governance, ensure food supply from the seas and oceans, advance polar science and knowledge on climate variability and predictive capabilities for changes such as sea level rise, and complete sea floor mapping, including habitats. This will include the further implementation of the Galway and Belém Statements, respectively signed with the US and Canada, and Brazil and South Africa with a vision of building an all Atlantic Ocean Community and by also implementing the bilateral Administrative Arrangements on Marine Research and Innovation Cooperation with Argentina and the Republic of Cabo Verde.

In the Mediterranean, marine research and innovation cooperation with a significant number of members of the Union for the Mediterranean will continue through the BLUEMED initiative. At the same time, a Strategic Research and Innovation Agenda for the Black Sea will be implemented, as part of the Common Maritime Strategy for the Black Sea.

The EU (both European Commission and several of the EU Member States) are actively cooperating with international partners within the Organisation for Economic Co-operation and Development (OECD), especially in its Working Party on Biotechnology, Nanotechnology and Converging Technologies (WP BNCT). Among the areas of future cooperation are the bio-based economy solutions, circular urban bioeconomy and sustainability assessment methodologies of bio-based products.

ANNEX 7 – MISSION AREAS AND PARTNERSHIP CANDIDATES

Mission Areas

Mission Area for Adaptation to Climate Change, including Societal Transformation

Addressing sectors, policies and systemic, transformative solutions (governance, technological, non-technological, services, behaviour changes, investments) in fields including notably: climate change adaptation and mitigation; climate services; natural resources; systemic and nature-based solutions; environmental advocacy and citizen engagement; sustainable production and consumption; disaster risk reduction and management including public health and critical infrastructures; international development in the field of climate change; science communication; water management; biodiversity; agriculture, finance and insurance.

Mission Area for Cancer

Addressing sectors, policies and systemic, transformative solutions (governance, technological, non-technological, services, behaviour changes, investments), in fields including notably: cancer prevention, prediction, detection, diagnosis and treatment including clinical expertise in these areas; quality of life and end of life care; public health policy and practice; patient representation incl support groups and family counselling, innovation and business development; ethics.

Mission Area for Healthy Oceans, Seas, Coastal and Inland Waters

Addressing sectors, policies and systemic, transformative solutions (governance, technological, non-technological, services, behaviour changes, investments), in fields including notably: systemic solutions for the prevention, reduction, mitigation and removal of marine pollution including plastics; transition to a circular and blue economy; public awareness raising; users affected by the need to adapt to and mitigate pollution and climate change in the ocean; sustainable use and management of ocean resources; development of new materials including biodegradable plastic substitutes, new feed and food; urban, coastal and maritime spatial planning; ocean governance; ocean economics applied to maritime activities.

Mission Area for Climate-neutral and Smart Cities

Addressing sectors and policies for systemic, transformative solutions (governance, technological, non-technological, services, behaviour changes, investments), in fields including notably: climate change mitigation and adaptation; air quality; spatial planning (incl. land urban and green spaces) and development; energy efficient buildings (retrofitting); urban infrastructures and networks, including transport and logistics systems, energy, ICT and water; clean energy transformation; urban manufacturing; urban circularity and regeneration; ecosystem services and nature-based solutions; public health and well-being in cities; urban resilience; social impacts of climate change.

Mission Area for Soil Health and Food

Addressing sectors and policies for systemic, transformative solutions (governance, technological, non-technological, services, behaviour changes, investments), in fields including: soil management in agriculture and forestry for food and nutrition security, and the delivery of non-food products and public goods; soil management beyond agriculture and forestry, e.g. peatland, wetland; restoration and remediation of soils, brownfields, soil sealing; potential of soils and soil management practices for climate mitigation and adaptation; soil functions and ecosystems' services, and the role of practises to improve soil health; sustainable land(scape) management, land use and land use change, spatial planning; eology, agroecology, soil microbiology; systems science / systems approaches, considering financial impacts of soil and land degradation.

Partnership Candidates

Preliminary list of candidates for European Partnerships in Pillar II, III and cross-pillar, and short description of what the partnership stands and aims for		Currently envisaged implementation mode(s)	Predecessors	Composition of partners	Relevance for clusters/pillars
Health	<p>1. EU-Africa Global Health Partnership</p> <p>Increase health security in sub-Saharan Africa and Europe, by accelerating the clinical development of effective, safe, accessible, suitable and affordable health technologies as well as health systems interventions for infectious diseases in partnership with Africa and international funders.</p>	Article 185 or Article 187 or Co-programmed or co-funded	EDCTP2 (Art.185)	MS/AC and 3 rd countries (i.e. sub-Saharan African countries) Foundations/industry on an ad-hoc basis	Cl.1
	<p>2. Innovative Health Initiative</p> <p>A collaborative platform bringing the pharmaceuticals, diagnostics, medical devices, imaging and digital sectors together for precompetitive R&I in areas of unmet public health need, to accelerate the development and uptake of people-centred health care innovations.</p>	Article 187 or Co-programmed	IMI2 (Art.187)	Industry, other organisations on an ad hoc basis	Cl.1
	<p>3. European partnership for chemicals risk assessment</p> <p>Bring together the European risk assessment and regulatory agencies to implement a joint research agenda, to ensure their capacity to deal with persistent or emerging challenges. It will promote the uptake of new methods, tools, technologies and information in chemical hazard identification and risk assessment and as part of this, sustain the development and use of human biomonitoring capacities in Europe.</p>	Co-funded	Human Bio-monitoring and a number of other actions	MS/AC, National agencies, tbd the role of the corresponding EU agencies	Cl.1, 4, 6
	<p>4. Pre-clinical/clinical health research</p> <p>The partnerships aims for establishing and implementing a strategic research agenda and joint</p>	Co-funded	Around 10 previous and current ERA-	MS / AC / 3rd countries	Cl.1, 6

	funding strategy between major European public funders in health research.		NET actions		
	<p>5. Large-scale innovation and transformation of health systems in a digital and ageing society</p> <p>Improving health and care models in an ageing, data-driven and digital society, shifting to holistic health promotion and person-centred care approaches through health policy and health systems research.</p>	Co-funded	AAL2 (Art.185), JPI 'More Years, Better Lives' and others	MS / AC Civil Society organisations	Cl.1
	<p>6. Personalised Medicine</p> <p>To align national research strategies, promote excellence, reinforce the competitiveness of European players in Personalised Medicine and enhance the European collaboration with non-EU countries</p>	Co-funded	ERA-PerMed and actions in support of ICPeMed	MS / AC	Cl.1
	<p>7. Rare Diseases</p> <p>To improve the integration, the effectiveness, the production and the social impact of research on rare diseases through the development, demonstration and promotion of Europe/ world-wide production, sharing and exploitation of research and clinical data, materials, processes, knowledge and know-hows.</p>	Co-funded	EJP Rare diseases (until 2023)	MS/AC /3 rd countries, civil society organisations, EU research infrastructures	Cl.1

Digital, Industry and Space	<p>8. High Performance Computing</p> <p>The EuroHPC Joint Undertaking will establish an integrated world-class supercomputing & data infrastructure and support a highly competitive and innovative HPC and Big Data ecosystem.</p>	Article 187 or Co-programmed	EuroHPC (Article 187)	Industry and MS/AC	CI.4
	<p>9.Key Digital Technologies</p> <p>Maintain the European Electronics Components and Systems industry at the technological forefront and contribute to boosting the EU's competitiveness, including that of its industries by providing essential components and software as well as the related manufacturing infrastructure in Europe and national strategies.</p>	Article 187 or Co-programmed	ECSEL (Article 187), part of Photonics cPPP	Industry and MS/AC (research funders)	CI.1,2,4,5
	<p>10. Smart Networks and Services</p> <p>Enabling the infrastructure basis in terms of key technologies and deployment for Next-Generation Internet services used by citizens and for "smart" services required by vertical sectors such as transport, energy, manufacturing, health and media.</p>	Article 187 or Co-programmed	cPPP 5G	Industry and academia in the field of connectivity	CI.1,4,5
	<p>11. AI, data and robotics</p> <p>The partnership on AI will help structuring the European AI community, develop a strategic research agenda and federate efforts around a topic that holds great potential to benefit our society and economy</p>	Co-programmed	cPPPs on Big Data and robotics	Industry, academia, end-users, and civil society	CI.3
	<p>12. Photonics Europe</p> <p>Photonics is one of the key drivers for tomorrow's digital markets and the development of the digital European society as a whole. Photons will replace electrons in many of our most important technologies and digital products.</p>	Co-programmed	cPPP Photonics21	Industry	CI.1,2,4,5,6
	<p>13. Clean Steel - Low Carbon Steelmaking</p> <p>The partnership on clean steel will provide a EU critical mass to ensure and in particular to upscale breakthrough technology, facilitate joint vision development, agenda setting and synergies of EU</p>	Co-programmed	Fuel cell and Hydrogen	Industry	CI.4,5

	different funds. It will also contribute to the evolution to a programming approach in R&I in the energy intensive industry.		(Article 187) cPPP Spire		
	14. European Metrology Accelerating the global lead in metrology research that Europe currently holds, and creating sustainable metrology networks for highly competitive and emerging metrology areas, while incorporating a wide range of stakeholders.	Article 185 or co-funded	EMPIR (Article 185)	MS/AC (National Metrology Institutes)	Cl.1,2,4,5,6
	15. Made in Europe Towards a competitive discrete manufacturing industry with a world-leading reduction of the environmental footprint whilst guaranteeing the highest level of well-being for workers, consumers and society.	Co-programmed	cPPPs Factories of the Future, part of Robotics and Photonics	Industry	Cl.1,5,6
	16. Carbon Neutral and Circular Industry Transforming European process industries to make them carbon neutral by 2050, to turn them into circular industries together with material and recycling industries, and to enhance their technological leadership at global level and international competitiveness.	Co-programmed	cPPP SPIRE	Industry CSO/NGOs	Cl.4,5,6
	17. Global competitive space systems Perform fast and structured advances on selected innovative critical space systems R&I roadmaps such as for example reusability, in orbit demonstration, assembly and manufacturing, so as to acquire global industrial leadership	Co-programmed	n.a.	Industry MS/AC	Cl.4
Climate, energy	18. Transforming Europe's rail system Define, design and implement the full spectrum of rail research and innovation activities, from fundamental research to large-scale demos, to trigger a major transformation of the railway system as	Article 187 or Co-programmed	Shift to Rail (Article 187)	Industry, Railway Operators and Infrastructure	Cl.5

the backbone of an integrated and sustainable mobility in Europe, maximising socio-economic benefits			Managers	
19. Integrated Air Traffic Management Enhance the performance of the Union's air traffic management system as technological pillar of the Single European Sky (SES) and more broadly of the air transport sector as a whole.	Article 187 or Co-programmed	SESAR (Article 187)	Industry, Eurocontrol	Cl.4, 5
20. Clean Aviation Accelerate and amplify the impact of the European aviation R&I on Energy Union, Mobility Package, renewed industrial policy strategy, EU GHG and air pollution emissions, including for 2050 horizon and noise regulations, tackling energy and climate-change challenges, industrial competitiveness, "first mover advantage" on international markets, and sustainable mobility.	Article 187 or Co-programmed	Clean Sky 2 (Article 187)	Industry	Cl.4, 5
21. Clean Hydrogen Accelerating the market entry of nearly-zero GHG-emission hydrogen-based technologies across energy, transport & industrial end-users, covering the full value chain for competitive hydrogen and fuel cells technologies, ensuring pole position for Europe to realise the potential of hydrogen technologies at scale.	Article 187 or Co-programmed	Fuel Cell and Hydrogen (Article 187)	Industry	Cl.4, 5
22. Built environment and construction Generate the necessary technology and socio-economic breakthroughs for an improved built environment to support the achievement of EU 2050 decarbonisation goals and the transition to clean energy and circular economy, while improving quality of living, health and wellbeing for people, ensuring a high degree of mobility and creating competitive ecosystems for business.	Co-programmed	Energy-efficient Buildings cPPP	Industry	Cl.4, 5
23. Towards zero-emission road transport (2ZERO) Accelerating the transformation of the road transport system into zero-emission mobility through	Co-programmed	European Green vehicle initiative	Industry	Cl.4, 5

	world-class European R&I and industrial system, with a competitive new generation of light weight, energy efficient and affordable vehicles and support measures to facilitate their rapid deployment		(cPPP)		
	<p>24. Mobility and Safety for Automated Road Transport</p> <p>Long-term framework to the strategic planning of research and pre-deployment programmes for connected and automated driving on roads at EU and national levels in a systemic approach (vehicle, interactions, infrastructure, technical and non-technical enablers and societal impact)</p>	Article 187 or Co-programmed	related: 5G, Big Data, ECSEL, S2R, SESAR, batteries, 2ZERO	Industry	Cl.4, 5
	<p>25. Batteries: Towards a competitive European industrial battery value chain</p> <p>Development of a world-class European R&I system on batteries, with a view towards European industrial leadership. Develop a coherent strategic programme, in cooperation with industry and research community, substantially contributing to fulfilling the Paris Agreement, and enhance the competitiveness of current and emerging European industries along the battery value chain.</p>	Co-programmed	n.a.	Industry	Cl.4, 5
	<p>26. Clean Energy Transition</p> <p>Respond to the call for decarbonisation in medium- and long-term in a holistic way, synthesizing all fragmented actions to allow for greater integration of relevant research & innovation areas and provide greater impact.</p>	Co-funded	Around 10 existing ERA-NET Cofund actions	MS/AC (RFOs and RPOs)	Cl.5
Food, Bioeconomy, Natural Resources,	<p>27. Accelerating farming systems transition: agro-ecology living labs&research infrastructures</p> <p>Grasping short to long-term agroecological processes at landscape level, accelerating the transition towards sustainable climate and environment-friendly farming practices by boosting place-based innovation in a co-creative environment, fostering adoption of innovation by farmers and other actors.</p>	Co-funded	n.a.	MS/AC (RFOs/regional authorities)	Cl.1,5,6
	<p>28. Animal health: Fighting infectious diseases</p> <p>The partnership aims to bring sustainable and innovative solutions to tackle infectious animal diseases, including those transmitted between animals and humans (zoonoses) and to contribute to the</p>	Co-programmed, Co-funded	A small number of current ERA-NETs	Either MS/AC or Industry, and regulatory	Cl.1,6

	fight against anti-microbial resistance, implementing the One Health concept. It will support sustainable animal production, reduce trade barriers, and protect consumers.			agencies	
	<p>29. Environmental Observations for a sustainable EU agriculture</p> <p>The objective of the initiative is to support the delivery of a sustainable CAP by improving agricultural practices and farm profitability and using the possibilities the current digital/data technics in the field. New services and applications will be developed for EU's farming sector enabling more efficient, environmentally friendly and profitable production systems.</p>	Co-funded	EuroGEOSS	MS/AC (RFOs, nat./reg. authorities)	CI.4,6
	<p>30. Rescuing biodiversity to safeguard life on Earth</p> <p>Halting biodiversity loss, maintaining and restoring natural capital is essential for the transition towards sustainability, climate neutrality and for respecting the planetary boundaries. The partnership aims to deploy solutions to stop the ongoing mass extinction of species caused by human activity by upscaling, aligning and integrating European R&I efforts and investment, guiding actions to protect, restore and sustainably manage ecosystems and natural capital.</p>	Co-funded	ERA-NET Biodiversity, EKLIPSE, ESMERALDA	MS/AC (RFOs, national/regional authorities)	CI.1,2,5,6
	<p>31. A climate neutral, sustainable and productive Blue Economy</p> <p>The objective is to sustainably unlock, demonstrate and harvest the full potential of Europe's Oceans and Seas through a well-structured, sustained and simplified joint effort in this borderless domain with the aim to support the transition to a strong, climate neutral and sustainable blue economy by 2050.</p>	Co-programmed or Co-funded	BONUS, MARTERA, JPI Oceans, BlueBio	MS/AC (RFOs, nat./reg. authorities), EU Agencies	CI.1,2,4,5,6
	<p>32. Safe and Sustainable Food System for People, Planet & Climate</p> <p>Fixing our food system is central to the transition to a 'Sustainable Europe by 2030', and key to meeting the IPCC climate targets and operating within key planetary boundaries. Deploy FOOD 2030 and deliver the Food Safety System of the future, ensuring consumer trust, safety, quality and traceability.</p>	Co-programmed or Co-funded	FACCE Surplus, ICT Agri2, Core-Organic, ERA GAS, SUSAN, ERA HDL, SusFood2	MS/AC (research funders, nat./reg. authorities), EU Agencies	CI.6

	<p>33. Circular bio-based Europe: Sustainable, inclusive and circular bio-based solutions</p> <p>Sustainable and climate-neutral solutions accelerating the transition to a healthy planet, where renewable products and nutrients will be produced from biomass and waste instead of non-renewable fossil and mineral resources. This creates awareness, capacities and appropriate structures extending beyond industry partners, mobilising producers of biological resources and end-users.</p>	Art.187 or Co-programmed	BBI JU	MS/AC (research funders, nat./reg. authorities)	Cl.4,5,6
	<p>34. Water4All: Water security for the planet</p> <p>Secure all water demands in terms of quality and quantity, protect both economic and natural systems, as well as people from water-related hazards. Support the transition to a healthy planet and to ensure a resilient Energy Union, EU climate neutral policy and respect of planetary boundaries.</p>	Co-programmed or Co-funded	Water JPI	MS/AC (RFOs, nat./reg. authorities)	Cl.1,2,4,5,6
Partnership candidates: Other Pillars	<p>35. Innovative SMEs</p> <p>The initiative aims support to transnational market-oriented research projects initiated and driven by innovative SMEs. Innovative SMEs shall take the lead and exploit commercially the project results, thus improving their competitive position. Research organisations, universities, other SMEs, large companies and others actors of the innovation chain can also participate.</p>	Art.185 or co-funded	Eurostars-2	MS/AC (SMEs)	Pillar III
	<p>36. European Science Cloud (EOSC)</p> <p>The EOSC 2.0 partnership is aimed at facilitating the EOSC implementation activities in its second phase. After 2020 the EOSC will become more stakeholder-driven, with a permanent governance structure in place, and would benefit from a co-programmed financing mechanism.</p>	Co-programmed or co-funded	n.a	MS/AC, Academia	Cross - Pillar
	<p>37. EIT Climate-KIC</p> <p>A network of universities, businesses and research organisations delivering solutions mitigate or adapt to climate change and accelerate the deployment of new solutions to market.</p>	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III

					Cl.5
38. EIT InnoEnergy	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III	Cl.5
It aims at building a sustainable, long-lasting operational framework among the knowledge triangle actors in the energy sector, with the goal of fostering the generation of new talents, the emergence and deployment of new innovative solutions and the creation and development of companies.					
39. EIT Digital	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III	Cl.4
EIT Digital's mission is to drive digital innovation and develop entrepreneurial talent in order to enhance both economic growth and quality of life across Europe.					
40. EIT Health	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III	Cl.1
EIT Health is a network of universities, businesses and research organisations delivering solutions to enable European citizens to live longer, healthier lives by promoting innovation.					
41. EIT Food	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III	Cl.5
EIT Food is a network of universities, businesses and research organisations delivering solutions to develop a highly skilled food sector. EIT Food collaborates with consumers to provide products, services and new technologies, which deliver a healthier lifestyle for all European citizens.					
42. EIT Manufacturing	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III	Cl.4
EIT Manufacturing will be a network of universities, businesses and research organisations delivering solutions to transform today's industrial forms of production towards more knowledge intensive, sustainable, low-emission, trans-sectoral manufacturing and processing technologies, to realise innovative products, processes and services.					

	<p>43. EIT Raw materials</p> <p>EIT RawMaterials is a network of universities, businesses and research organisations delivering solutions to boost competitiveness, growth and attractiveness of the European raw materials sector via radical innovation, new educational approaches and guided entrepreneurship.</p>	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III Cl.4
	<p>44. EIT Urban Mobility</p> <p>EIT Urban Mobility will be a network of universities, businesses and research organisations delivering solutions to develop a greener, more inclusive, safer and smarter urban transport system.</p>	EIT-KIC	n.a	MS/AC, Industry, Academia	Pillar III Cl.5