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Single Basic Act for Joint Undertakings and thematic priorities for the European Partnership portfolio in Horizon Europe 28-34

Fields marked with * are mandatory.

Introduction

Single Basic Act for Joint Undertakings and thematic priorities for the European Partnerships portfolio in Horizon Europe 28-34

Public Consultation Questionnaire

This open public consultation focuses on the preparation of the **European Partnerships under the new Horizon Europe programme 28-34 (HE 28-34)**. These include Treaty-based partnerships, i.e. Art. 187 TFEU Joint Undertakings (JUs) and Art. 185 TFEU initiatives, and Work Programme-based partnerships (encompassing the existing co-programmed and co-funded partnerships). **For reasons of efficiency, the consultation will cover two complementary strands:** the development of a Single Basic Act for the Joint Undertakings, and the definition of the thematic areas to be addressed within the overall set of European Partnerships, defined as “partnership portfolio”.

Treaty-based partnerships, i.e. Art. 187 TFEU Joint Undertakings (JUs) and Art. 185 TFEU initiatives, are unique instruments in the EU R&I funding landscape that bring together different actors around shared strategic priorities. Industry, Research Performing Organisations, Member States/Associated Countries and the EU pool resources and efforts to foster research, development and deployment of breakthrough technologies and push for system change. By combining and jointly deploying public and private resources, they enable the mobilisation of investments and expertise that go beyond what individual actors could achieve on their own.

Similarly to the situation under the current Multiannual Financial Framework (MFF) the Commission is preparing a single establishing legislative act for Joint Undertakings (hereinafter referred to as the Single Basic Act (SBA)), in the context of the next MFF, notably Article 11(4) of the Commission proposal for a Regulation establishing Horizon Europe 28-34 (HE 28-34). **This public consultation is part of the**

preparation of this future SBA for JUs and of any potential basic act(s), e.g. to establish Article 185 TFEU initiative(s), under HE 28-34.

Together with the Work Programme based partnerships, the Art. 187 TFEU JUs and Art. 185 TFEU initiatives will be part of the partnership portfolio, chosen to match the EU's strategic priorities and to avoid gaps or overlap between initiatives. **Therefore, to ensure a coherent approach, the consultation includes a set of questions on the portfolio of partnerships in HE 28-34, beyond Art. 187 TFEU JUs and Art. 185 initiatives.**

Reflecting the work strands outlined above, **the questions in this consultation are structured in three distinct sections:**

The first section refers to Treaty-based partnerships and starts with questions focused on the functioning of current Treaty-based partnerships and potential areas for improvement under the next MFF. It continues with questions on the specific objectives and on the possible policy measures to achieve them.

The second section aims to collect ideas and suggestions on the characteristics of the portfolio of European Partnerships and possible thematic areas to be addressed by partnerships under HE 28-34, irrespective of their implementation type.

The last section of the survey contains a number of questions about the respondents and their relation to European Partnerships, if any.

This public consultation will inform the Impact Assessment of the proposal for the future SBA for JUs and of any potential separate legal act (one or several), for instance, to establish Art.185 TFEU initiatives, as well as also support the ongoing process of building the new portfolio of partnership areas under HE 28-34.

About you

* Language of my contribution

- ○ Bulgarian
- ○ Croatian
- ○ Czech
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- ○ Dutch
- ◉ English
- ○ Estonian
- ○ Finnish

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- Irish
- Italian
- Latvian
- Lithuanian
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- Polish
- Portuguese
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- Slovenian
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- Swedish

* I am giving my contribution as

- Academic/research institution
- Business association
- Company/business
- Consumer organisation
- EU citizen
- Environmental organisation
- Non-EU citizen
- Non-governmental organisation (NGO)
- Public authority
- Trade union
- (•) Other

* First name

CAROLINE

* Surname

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* Email (this won't be published)

caroline.almeras@ectri.org

* Organisation name

255 character(s) maximum

ECTRI - European Conference of Transport Research Institutes

* Organisation size

- (•) Micro (1 to 9 employees)
- ( ) Small (10 to 49 employees)
- ( ) Medium (50 to 249 employees)
- ( ) Large (250 or more)

Transparency register number

Check if your organisation is on the transparency register. It's a voluntary database for organisations seeking to influence EU decision-making.

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* Country of origin

Please add your country of origin, or that of your organisation.

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- El Salvador
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- Grenada
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- Madagascar
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- Malaysia
- Maldives
- Mali
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- Marshall Islands
- Martinique
- Mauritania
- Mauritius
- Mayotte
- Mexico
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- Moldova
- Monaco
- Mongolia
- Montenegro
- Montserrat
- Morocco
- Mozambique
- Myanmar/Burma
- Namibia
- Nauru
- Nepal
- São Tomé and Príncipe
- Saudi Arabia
- Senegal
- Serbia
- Seychelles
- Sierra Leone
- Singapore
- Sint Maarten
- Slovakia
- Slovenia
- Solomon Islands
- Somalia
- South Africa
- South Georgia and the South Sandwich Islands
- South Korea
- South Sudan
- Spain
- Sri Lanka
- Sudan
- Suriname
- Svalbard and Jan Mayen
- Sweden
- Switzerland
- Syria

- Botswana
- Bouvet Island
- Brazil
- British Indian Ocean Territory
- British Virgin Islands
- Brunei
- Bulgaria
- Burkina Faso
- Burundi
- Cambodia
- Cameroon
- Canada
- Cape Verde
- Cayman Islands
- Central African Republic
- Chad
- Chile
- China
- Christmas Island
- Clipperton
- Cocos (Keeling) Islands
- Colombia
- Guatemala
- Guernsey
- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- Heard Island and McDonald Islands
- Honduras
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iran
- Iraq
- Ireland
- Isle of Man
- Israel
- Italy
- Jamaica
- Japan
- Jersey
- Netherlands
- New Caledonia
- New Zealand
- Nicaragua
- Niger
- Nigeria
- Niue
- Norfolk Island
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- Norway
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- Türkiye
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- United Arab Emirates
- United Kingdom
- United States
- United States Minor Outlying Islands
- Uruguay

- Comoros
- Congo
- Cook Islands
- Costa Rica
- Côte d'Ivoire
- Croatia
- Cuba
- Curaçao
- Cyprus
- Czechia
- Democratic Republic of the Congo
- Denmark
- Jordan
- Kazakhstan
- Kenya
- Kiribati
- Kosovo
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- Liberia
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- Réunion
- Romania
- Russia
- Rwanda
- Saint Barthélemy
- Saint Helena Ascension and Tristan da Cunha
- Saint Kitts and Nevis
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- Zimbabwe

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The Commission will publish the responses to this public consultation. You can choose whether you would like your details to be made public or to remain anonymous.

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Organisation details and respondent details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published. Your name will also be published.

☑ I agree with the personal data protection provisions

Table of contents

Following the "Introduction" and "About you" the consultation consists out of three distinct sections:

1.Questions about Treaty-based partnerships in Horizon Europe 28-34
2.Questions on European Partnership portfolio in Horizon Europe 28-34
3.Questions about the respondent linked with European Partnerships

Estimated time for completion: 30–40 minutes.

1. Questions about Treaty-based partnerships in Horizon Europe 28-34

Many questions below, which refer to Treaty-based partnerships, are relevant both to JUs and Art.185 TFEU initiatives, unless specified otherwise. As mentioned in the introduction, the SBA initiative addresses JUs, while Art.185 TFEU initiatives will potentially be established by a separate legal act (one or several).

If a question mainly relates to a type of partnership (e.g., JU or Article 185 TFEU initiative) that you are not familiar with, you may select 'Cannot say'.

Questions group 1: Views on the areas of improvement

Changed geopolitical conditions and new EU strategic priorities call for increasing efficiency, effectiveness and maximising the impact of Treaty-based partnerships at system level on R&I, competitiveness performance, technological development and industrial deployment. This requires a strategic revision of the partnership landscape and the related enabling conditions, particularly in view of the whole innovation-to-investment journey. This will also account for the link with the European Competitiveness Fund (ECF), which is

aimed at boosting the market uptake of innovative technologies, and may support the partnerships set up under HE 28-34, where necessary to achieve its objectives.

The current MFF has demonstrated the key value of partnerships in aligning strategic agendas, leveraging public and private investment, and building ecosystems around key EU priorities. Therefore, partnerships have been an instrument of strategic importance for boosting Europe's global competitiveness. To ensure that they continue to have a significant impact in a rapidly evolving environment the Commission has identified five potential areas for improvement*– described below -, which will have to be addressed by the future Treaty-based partnerships. As the SBA for JUs under HE 28-34 will aim to define measures to tackle such areas for improvement, the Commission intends to identify the most appropriate and impactful ways to do so:

- Area 1: Treaty-based partnerships do not sufficiently support the development, uptake and/or deployment of new technologies and solutions by EU industry and society
- Area 2: Private co-funding in some Treaty-based partnerships is insufficient to create significant impact
- Area 3: Treaty-based partnerships are not fully aligned with the current EU strategic vision
- Area 4: Cross-fertilisation and knowledge dissemination is low among Treaty-based partnerships, and between Treaty-based partnerships and other publicly funded R&I initiatives
- Area 5: The requirements for membership, participation, and funding access in Treaty-based partnerships are hard to understand and navigate.

**These areas for improvement have been identified in various evaluations and do not necessarily pertain to all existing JUs, but are relevant to some JUs to varying extent.*

1.1 To what extent do you agree or disagree on the following areas for improvement to be addressed in future Treaty-based partnerships?

* Treaty-based partnerships do not sufficiently support the development, uptake and/or deployment of new technologies and solutions by EU industry and society

Maximum 1 selection(s)

- ☐ Fully agree
- ☐ Somewhat agree
- ☐ Neutral
- ☑ Somewhat disagree
- ☐ Fully disagree
- ☐ Cannot say

* Private co-funding in Treaty-based partnerships is insufficient to create significant impact

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Treaty-based partnerships are not fully aligned with the current EU strategic vision

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Cross-fertilisation and knowledge dissemination is low among Treaty-based partnerships, as well as between Treaty-based partnerships and other publicly funded R&I initiatives

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [x] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* The requirements for membership, participation, and funding access in JUs are hard to understand and navigate

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree

- [ ] Fully disagree
- [ ] Cannot say

Are there other problems to be considered in relation to Treaty-based partnerships that are not included above? (optional, open field)

Existing JUs are fully aligned with the Commission priorities applicable at the time of their establishment. But the Commission priorities change at least every five years (e.g. from Green Deal to Competitiveness), while JUs run for a fixed seven-year term (or as long as the remaining). Some divergence between the two is structurally inevitable and should not be considered a fault of the Joint Undertakings.

On funding access: under current Horizon Europe rules, R&I activities must typically end at around TRL 6. Linking Horizon Europe 28-34 with the European Competitiveness Fund (ECF) would bridge the resulting market-launch gap and place greater emphasis on deployment and implementation.

Access to and participation in Treaty-based partnerships should remain open and merit-based. At times, participation in activities and calls appears to be effectively reserved for a pre-constituted group of organisations, which runs counter to the open and competitive principles underlying European Partnerships. Governance of the partnerships is perceived as complex and insufficiently transparent, with limited public accountability.

In addition, the administrative burden associated with Treaty-based partnerships has grown over successive framework programmes and should be addressed as part of the renewal. In particular, the certification of in-kind contributions for additional activities (IKAA) generates significant and largely unpredictable costs for members, which acts as a deterrent for smaller organisations seeking membership.

Finally, from the perspective of private stakeholders, any shift from in-kind contributions to mandatory cash contributions towards the operational costs of partnerships must be firmly rejected. Such funds would ultimately be made available to direct competitors – including in cases where a partner's own proposals are not selected – which would render private participation economically unviable.

The SRI(D)A-driven, consensus-based programming of JUs tends to converge on technology pathways already mastered by the established members, favouring system optimisation over paradigm-shifting breakthroughs. To counter this, each partnership should reserve a dedicated share of its budget for open, bottom-up exploratory calls with higher funding rates and explicit tolerance for negative results.

Partnerships largely operate in isolation, with their own call cycles, rules and governance, and limited formal mechanisms for two-way exchange of results, infrastructure access and coordinated programming with the main Horizon Europe work programme, the EIC/ERC, or the upcoming ECF. The SBA should require each partnership to define concrete ecosystem-linkage measures (open results sharing, infrastructure access, structured transition paths to the ECF).

Questions group 2: Views on the drivers

To address potential areas for improvement, the Commission needs to understand what is driving them. In the following part, we are interested in your views on potential factors which support or hamper Treaty-based partnerships to reach their objectives.

2.1 To what extent do you agree/ disagree that the following factors are obstacles for Treaty-based partnerships to support the uptake and deployment of new technologies and solutions by industry and society?

* Treaty-based partnerships primarily support research and development with limited funding to pre-commercial activities

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* A risk-averse attitude from partners, with limited appetite to invest in high-risk projects

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Limited interest in working jointly with commercial competitors on projects closer to the deployment stage

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

2.2 To what extent do you agree/ disagree that the following factors prevent the Treaty-based partnerships to raise sufficient private co-funding to create and maximise their impact?

* The Union's contribution does not trigger sufficient private co-funding that would jointly create significant change in a sector (disruptive technology, scale-up)

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* The Member States/Associated Countries' contributions do not trigger sufficient private co-funding that would jointly create significant change in a sector (disruptive technology, scale-up)

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* The current design of 'in-kind contributions to additional activities' — contributions provided outside the funded projects — risks diverting meaningful contributions from Treaty-based partnerships' projects

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [x] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

2.3 To what extent do you agree/ disagree that the following factors limit the alignment of Treaty-based partnerships with the current EU strategic vision?

* The topics of the existing set of Treaty-based partnerships no longer sufficiently address the most important and emerging challenges of the EU, including strategic sectors and technologies

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* There is lack of funding flexibility in Treaty-based partnerships, with funding allocated to fixed areas with little room to adapt when new technologies emerge or political priorities change

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* The size of individual calls (individual call budgets) is too small to introduce disruptive changes in a dedicated area

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

2.4 To what extent do you agree/ disagree that the following factor limits cross-fertilisation and knowledge dissemination in Treaty-based partnerships?

* Programming of Treaty-based partnerships is not flexible enough to accommodate cross-sectoral cooperation with other sectors and/or among Treaty-based partnerships

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [x] Fully disagree
- [ ] Cannot say

* The time required for set up and the administrative burden of managing joint calls hinders collaboration across sectors and JUs

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Concerns on confidentiality and intellectual property rights from private partners create unfavourable conditions for cross-sectoral cooperation among Treaty-based partnerships

Maximum 1 selection(s)

- [ ] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [x] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

2.5 To what extent do you agree/ disagree that the following factors make the requirements for membership, participation, and funding access in JUs hard to understand and navigate?

* The level of financial commitment to join a JU is an entrance hurdle for new members, particularly for SMEs

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Treaty-based partnerships rely on complex organisational structures and governance, including different rules, work streams, and guidelines.

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Members and participants of Treaty-based partnerships face high administrative burden (e.g. reporting complexity)

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

2.6 Are there any other key factors, not mentioned in points 2.1 to 2.5, which you think should be addressed in the design of Treaty-based partnerships under HE 28-34? If yes, please explain (optional)

3000 character(s) maximum

Europe's technological sovereignty and industrial competitiveness depend on building critical scientific capabilities and translating them into innovation. Joint Undertakings (JUs) have proven effective in pooling funding, enabling public–private co-investment and providing long-term strategic alignment to address challenges that no single industry or country can solve alone.

Several key factors should therefore be addressed in the design of Treaty-based partnerships under HE 2028–2034:
- European technological and industrial sovereignty: JUs support industrial leadership in critical sectors and help prevent the loss of key technologies, knowledge, skills and investment to competing global markets.

- Knowledge exchange and infrastructure sharing: JUs coordinate European research and technology infrastructures, providing cross-border access to tools, data and testing facilities. They also enable rapid access to reliable knowledge for public authorities and organisations with security responsibilities, including civil protection agencies, the police and the military.

- Bridging the lab-to-market gap: JUs connect fundamental and applied research, technology development and demonstration across the full TRL spectrum, maintaining a strong pipeline for future innovation.

- Resource leverage: By combining EU funding with contributions from industry, research organisations and academia, JUs increase the financial impact of public investment and share investment risks.

- Value chain integration: JUs connect sectors, create synergies and support the development of functional European supply chains.

- Workforce development: JUs contribute to training, education and upskilling, helping to address labour shortages, attract talent and build specialised skills.

The added value of partnerships lies particularly in accelerated market entry, leverage of private investment, strategic autonomy, avoidance of fragmentation, and long-term planning stability. These outcomes cannot be achieved to the same extent through individual calls for proposals under the framework programme.

Considering the importance of aligning behavioural changes (of people and businesses) with technological innovation, access of research institutes and universities should be strongly facilitated through implementing 'green access routes' for research and innovation (R&I). Additionally, to avoid subsystem silos, twinning mechanisms should be established to promote mode and cross-sectoral collaboration (e.g., road-rail, maritime-rail) to ensure interoperability and seamless multimodal/intermodal transport systems in Europe. Addressing these issues will accelerate the uptake of sustainable innovations and maximise the societal impact of Treaty-based partnerships under Horizon Europe 2028-2034. Green access routes to R&I should be designed with a network-based perspective to ensure scalability and systemic impact.

2.7 Are there any examples of current Treaty-based partnerships addressing the issues identified above, which you think could be considered as a best

practice in the design of Treaty-based partnerships under HE 28-34? If yes, please explain which issues and how (optional)

3000 character(s) maximum

EU-Rail and SESAR JU are strong examples of how Treaty-based partnerships can address key challenges and provide lessons for the design of partnerships under HE 2028–2034.

EU-Rail demonstrates the value of a dedicated Article 187 Joint Undertaking for a complex industrial ecosystem. By bringing together the EU, railway undertakings, infrastructure managers, industry, SMEs, universities and research organisations, it addresses sector challenges collectively and develops solutions with those responsible for implementation. Building on Shift2Rail, it has supported advances in ERTMS, autonomous train operation, digital traffic management, next-generation traction and the Digital Automatic Coupler, contributing to a safer, more digital and sustainable European rail system.

EU-Rail also shows how partnerships can create synergies beyond their own sector. It has pioneered joint calls with the SESAR and SNS JUs, including activities on air–rail traffic management and 5G/6G technologies. This established procedure can be reused across EU bodies without additional administrative burden. In addition, close cooperation with the Commission and the European Union Agency for Railways links research and innovation with regulation, standardisation and deployment.

SESAR JU further illustrates the potential of combining different EU funding instruments within a partnership. While SESAR JU is funded under Horizon 2020 and Horizon Europe, SESAR deployment is supported through the Connecting Europe Facility. Similarly, the Clean Hydrogen JU has used additional funding, including through RePowerEU, to launch deployment activities such as Hydrogen Valleys.

Combining funding from FP10 with instruments such as CEF or the European Competitiveness Fund could help cover the entire innovation chain, from basic and applied research to market uptake. Additional funding could also support the ramp-up of technologies and strengthen the competitiveness of European industry. However, funding rules must allow results from Framework Programme projects to be transferred directly to successor programmes. The experience of Clean Sky and Clean Aviation shows the risk otherwise: project results could not secure follow-on funding from the EU Innovation Fund, as long development and lead times were not adequately reflected in its criteria.

Finally, private partners' in-kind contributions are essential to the JU model. Across all the JUs mentioned, private members demonstrate broad support for these joint undertakings by providing in-kind contributions that exceed the minimum levels formally required. But it should be noted that the IKOP/IKAA must be certified in order to be officially recognised by the European Commission. The effort and costs involved in this process are also borne by the private members, which places an additional administrative and financial burden on smaller players in particular.

Questions group 3: Views on objectives

To address the problems, the Commission needs to set an overall direction for the future SBA and come up with several practical steps to take in that direction. These steps will guide the policy choices for the Treaty-based partnerships under HE 28-34. In this section, we are interested in your views on the relevance of five possible objectives.

3.1 To what extent do you agree or disagree that the following objectives are relevant for Treaty-based partnerships?

* Delivering and deploying innovative solutions and technologies

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Using the EU and Member States/Associated Countries' budget in Treaty-based partnerships to raise R&I private investment

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Increasing JUs' critical mass and scientific and technological capabilities to scale and target efforts at EU strategic industrial priorities

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Ensure cross-fertilisation through synergies, collaboration and coherence between Treaty-based partnerships, for example through more agile programming

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Make Treaty-based partnerships more accessible and open to new members, in particular for start-ups and scale ups

Maximum 1 selection(s)

- [x] Fully agree
- [ ] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

* Make Treaty-based partnerships focused on increasing competitiveness of EU strategic industrial sectors

Maximum 1 selection(s)

- [ ] Fully agree
- [x] Somewhat agree
- [ ] Neutral
- [ ] Somewhat disagree
- [ ] Fully disagree
- [ ] Cannot say

3.2 Should any other objectives guide policy choices when designing Treaty-based partnerships under HE 28-34? If yes, please explain (optional)

3000 character(s) maximum

The following key objectives should guide policy choices when designing Treaty-based partnerships under Horizon Europe 2028–34:

- Tailor partnerships to sector-specific needs. Purpose, governance, funding leverage and expected impact should be tailored to the specific objectives and needs of each sector, not to a one-size-fits-all model.

- Safeguard R&I critical mass across the full TRL chain, with sufficient emphasis on upstream and bottom-up research. While deployment focus and alignment with Commission priorities are necessary, sustained European innovation leadership requires a balanced portfolio across all TRLs, with space for breakthrough ideas. Complementary deployment-focused instruments (e.g. ECF) can support market uptake, allowing partnerships to preserve a complete innovation chain from discovery to industrial application.

- Build on mature European innovation ecosystems combining strong academia–RTO–industry cooperation and substantial co-investment, while enabling participation by SMEs, start-ups and scale-ups. Partnerships should be anchored in ecosystems combining Academia and RTOs capable of driving fundamental breakthroughs with globally competitive industrial players able to absorb, scale and commercialise results. At the same time, SMEs, start-ups and scale-ups should participate in calls and consortia without the administrative and financial burden of formal membership.

- Preserve Treaty-based partnerships as the primary instrument for strategic sectors requiring binding commitments, dedicated governance and sustained long-term coordination. While co-programmed partnerships offer operational agility, they cannot provide the same binding financial commitments and long-term coordination. Treaty-based instruments should remain a key vehicle for sectors requiring sustained investment to deliver major technological transitions, industrial competitiveness and European strategic autonomy.

- Maintain a clear strategic and thematic focus around coherent value chains, avoiding catch-all structures. Cross-partnership synergies should be pursued only where priorities and stakeholder interests genuinely align, not artificially across divergent mandates or industrial interests.

- Wider EU environmental and social objectives (environmental quality, climate change, social cohesion) should remain at the core and be the key driver for technological innovation and industrial competitiveness. The Sustainable Development Goals should guide policy choices to ensure that people, businesses and the planet are not left behind.

Questions group 4: Views on possible policy measures

4.1 How effective do you consider the following mechanisms to support the uptake and deployment of new technologies and solutions by EU industry and society?

Measure	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective	Don't know
* Requirement for Treaty-based partnerships to fund activities and solutions at all technology readiness levels, from basic research to close-to-market (TRL 1-9)	○	◉	○	○	○	○
* Requirement for a minimum share of each Treaty-based						

partnership budget allocated to close-to-market activities (TRL 7-9)	○	○	◉	○	○	○
* Treaty-based partnerships to support the implementation of the European Competitiveness Fund (ECF)	○	○	○	○	◉	○

Should any other measures be considered, also based on current Treaty-based partnerships examples, to support the uptake and deployment of new technologies and solutions by EU industry and society? If yes, please explain (optional)

3000 character(s) maximum

Cross-modal cooperation is critical for achieving transport system sustainability, as decarbonisation, efficiency and resilience depend on optimising the entire mobility and logistics network rather than individual modes. A systemic perspective should therefore be integrated across research and innovation activities, addressing transport as an interconnected system of infrastructures, services, vehicles, energy supply, digital networks and users.

This requires structured interaction between Partnerships, with Pillar II providing a strong framework for cross-cutting cooperation. Appropriate interfaces should be established between existing Joint Undertakings and other European Partnerships to align priorities, share knowledge and results, and coordinate action on issues such as digitalisation, AI, interoperability, multimodal logistics, energy, infrastructure resilience and sustainable fuels.

A cross-modal and systemic approach would accelerate the deployment of digital and green technologies, strengthen network effects and improve the adaptability of the transport system to evolving societal, economic and environmental demands.

In addition, it is essential to cover the entire TRL chain rather than focusing solely on the (rapid) introduction of products into the market. It is equally crucial to ensure that commercialisation activities are not carried out at the expense of research and technological development in lower TRL range. Activities and projects at low and medium TRL levels are vital for filling Europe’s future innovation pipeline with valuable ideas. Any approach, which focuses solely on market launch, would merely lead to a shortage of innovation in Europe in the medium and long term, as the innovation pipeline would dry up.

Therefore, additional funding from various EU programmes such as the ECF, CEF, regional funds, etc., should be integrated as a source of funding for treaty-based partnerships, in order to support, in particular, the introduction and market penetration of R&I results, the training and development of the workforce, and research and technology infrastructures. The funding rules of the various EU programmes must be harmonised accordingly.

4.2 How effective do you consider the following mechanisms to raise R&I private investment in Treaty-based partnerships?

Measure	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective	Don't know
* Limit the EU share of funding for projects (Lower funding rate)	○	○	○	○	◉	○
* Higher minimum contributions from private sector members	○	○	○	◉	○	○
* Redesign rules for non-cash contributions from private sector members of Treaty-based partnerships	○	○	○	◉	○	○
* Design clearer “return-on-investment” pathways for industry, e.g. deployment-linked calls, flagship demonstrators	○	◉	○	○	○	○

Should other measures be considered, also based on current Treaty-based partnerships examples, to raise R&I private investment in Treaty-based partnerships? If yes, please explain (optional)

3000 character(s) maximum

At low and medium TRL levels, a large number of smaller-scale funding rounds are required to develop the best ideas and solutions in a competitive environment. As the project scales up (uptake), fewer funding rounds are needed, but the budget per call/project must be significantly higher. For deployment, it is sufficient to focus on the most promising solution with a substantial budget coming additionally from other EU programs (ECF, CEF; …) as well as other funding lines in Horizon Europe (e.g. EIC).

Regarding administration burden, the demand for cash contributions alongside competitive and open calls for proposals is fundamentally flawed and economically untenable. No private member is likely to contribute cash-contributions for operational activities into a common pot without receiving a guaranteed return on investment.

The link between lower funding rates and a private commitment to fulfil financial obligations within a Joint Undertaking (JU) can certainly be encouraged, but must be discussed in detail and in consultation with private stakeholders. There is no one-size-fits-all solution.

4.3 How effective do you consider the following mechanisms to increase JUs' critical mass and scientific and technological capabilities to scale and target efforts at EU strategic priorities?

Measure	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective	Don't know
* Minimum size (budget) of call for proposals in Treaty-based partnerships	○	◉	○	○	○	○
* Replace multiple smaller calls by one substantial call per year per Treaty-based partnerships, where applicable	○	○	○	◉	○	○
* Minimum share of call budget dedicated to activities related to high-tech content, for each Treaty-based partnerships call	◉	○	○	○	○	○
* Alignment of Treaty-based partnerships thematics with those proposed in the ECF /HE 28-34 policy windows*						

**1) Clean transition and industrial decarbonisation, 2) digital leadership, 3) health, biotech, agriculture and bioeconomy, and 4) resilience, security, defence and space*	○	○	○	○	○	◉

Should any other measures be considered, also based on current Treaty-based partnerships examples, for increasing and focusing efforts in line with EU strategic priorities via JUs? If yes, please explain (optional)

3000 character(s) maximum

Increase EC's handling speed, shortening the time significantly between applications and project start for awarded projects. This in order to ensure relevance and competitiveness.

A progressive and differentiated funding approach across TRLs is essential to maximise both innovation potential and impact:

- At low and medium TRLs, partnerships should maintain a broad R&I portfolio (with a large number of small-scale funding rounds), in a competitive environment allowing multiple technological pathways and breakthrough concepts to be explored before selecting the most promising solutions. At the same time, Academia, SMEs, start-ups and scale-ups should be enabled to participate in calls and consortia without the administrative & financial burden of formal partnership membership.
- As technologies mature, support should become progressively more focused, with larger investments directed towards fewer, higher-potential solutions (i.e. fewer funding rounds are needed, but the budget per call /project must be significantly higher).
- For deployment, it is sufficient to focus on the most promising solution with a substantial budget.

This progressive concentration of resources can also strengthen private-sector commitment. Clear pathways towards industrial application provide greater visibility for private stakeholders, creating stronger incentives for co-investment.

The objective should therefore be to combine openness and technological diversity at earlier stages with greater focus and investment intensity as solutions mature.

4.4 How effective do you consider the following mechanisms for cross-fertilisation through synergies, collaboration and coherence among Treaty-based partnerships, in your opinion?

Measure	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective	Don't know
* Introducing larger JUs covering broader thematics						

to improve flexibility in programming	○	○	◉	○	○	○
* Introducing one single JU covering all thematics to improve flexibility in programming	○	○	○	○	◉	○
* Other measures to improve flexibility in programming	○	○	○	○	○	◉
* Minimum number of joint calls between sectoral Treaty-based partnerships and with other partnerships	○	○	○	○	◉	○
* Promote inter-JU (or, where relevant, inter – Treaty-based partnerships) activities, such as access to research infrastructures	○	○	◉	○	○	○
* Simplify administrative functions by centralising them	○	○	◉	○	○	○
* Identify synergies in SRIAs (Strategic Research and Innovation Agenda, potentially including 'Deployment' as an additional element) of JUs in related sectors	○	○	◉	○	○	○

Should any other measures be considered, also based on current Treaty-based partnerships examples, for cross-fertilization through synergies, collaboration and coherence among Treaty-based partnerships? If yes, please explain (optional)

3000 character(s) maximum

The idea of grouping several JU's together to thereby leverage synergies and efficiency is far too simplistic and, moreover, ineffective. JUs succeed precisely because of their clear, stakeholder-aligned strategic focus; introducing constant directional change would erode private-sector confidence and industry commitment. While reducing the number of JUs eases oversight, a sprawling multi-domain vehicle does not advance Europe's competitiveness goals. Broader thematic coverage may be sensible in some cases, but in others it dilutes focus. The optimal size of a partnership therefore depends on the specific challenges to be addressed; what is needed is a sharp strategic focus with clearly defined timeframes, budgets, and resources, not one-size-fits-all consolidation. Synergies should be built where genuine thematic or technological interfaces exist, for example through joint calls and exchange platforms, and administrative simplification for private stakeholders is welcome only where it is real simplification rather than a mere shifting of burdens. We therefore propose to first map

synergies structurally across the SRI(D)As of JUs in related sectors - potentially adding pre-deployment as a further element - so that cooperation is programmed rather than opportunistic, and second to organise synergies beyond the partnership landscape, with EU programmes and instruments outside the JUs.

4.5 How effective do you consider the following mechanisms to make Treaty-based partnerships more accessible and open to new members, in particular for startups and scale ups?

Measure	Extremely effective	Very effective	Moderately effective	Slightly effective	Not effective	Don't know
* New competitive selection of Treaty-based partnerships private partners (*European Partnerships, including JUs, should be selected through a competitive, open, non-discriminatory and transparent procedure (Article 5(1a) of the proposal for establishing the Specific Programme implementing HE 28-34). Since the composition of the partnership itself is one of the criteria for selecting a European Partnership, the competitive selection process must also encompass the identification and selection of the participating partners themselves.)*	○	◉	○	○	○	○
* Minimum share of Treaty-based partnerships membership for SMEs/startups/scale up	○	○	○	◉	○	○
* Minimum call budget for SMEs/ startups/scale ups, for each Treaty-based partnerships call	○	○	◉	○	○	○
* Dedicated calls targeting SMEs/start-ups, with more agile processes	○	○	○	◉	○	○
* Simplification of governance of Art 185 TFEU initiatives and JUs (art. 187 TFEU)	◉	○	○	○	○	○
* Simplification of procedures to submit proposals and implement projects (work programme, administrative and financial procedures, etc.)	◉	○	○	○	○	○

Should any other measures be considered, also based on current Treaty-based partnerships examples, for making Treaty-based partnerships more accessible and open to new members, in particular for SMEs, start ups and scale ups? If yes, please explain (optional)

3000 character(s) maximum

The role of Academia and SMEs (alongside that of industry and RTOs) is crucial to the success of a partnership and the achievement of its objectives. In this respect, targeted support measures should be put in place to increase the proportion of Academia and SMEs in partnerships. These should reduce the administrative and financial burden. This would also benefit the other private stakeholders (industry and RTOs). In our view, transparency, clear rules, a clear focus in calls for proposals, appropriate funding rates and appropriate success rates are crucial. In that sense, accessibility should be pursued through participation not only by membership.

However, whilst the removal of administrative and financial barriers (for SMEs as well as other private members such as academia) is important, the capabilities of the participants are far more decisive for the success of the partnership than the percentage breakdown between industry, SMEs and academia. The quality and capability of members to achieve the goals are more important than a big number of members, who might not contribute substantially to the achievement of goals.

In several Joint undertakings additional organisations particularly from SME, RTO and Universities became members as result of additional open calls for membership. It would be beneficial that those types of organisations are involved from the start when the JU is being set up.

2. Questions on the Horizon Europe 28-34 partnerships portfolio

While this consultation forms part of the process for defining potential future Treaty-based Partnerships, they are expected to remain one implementation modality within a coherent package of partnerships, defined as the European Partnerships portfolio. Their thematic scope, strategic rationale and complementarity therefore need to be assessed alongside Work Programme-based Partnerships to avoid duplication, gaps and inconsistencies across the overall landscape.

The following questions on the broader portfolio are therefore intended to provide context on strategic priorities and portfolio needs, relevant for all types of partnerships.

***1 - In your opinion, what is fundamentally needed in the portfolio building process and resulting portfolio of European partnerships?**

- [x] A clear strategic rationale behind the design of the portfolio
- [x] Coherent structuring of the thematic areas to be addressed by partnerships, avoiding overlaps and fragmentation
- [x]

A value chain approach exploring synergies and interdependencies within specific industrial ecosystems

- [ ] A balanced mix of stability (long-term structuring) and agility (ability to evolve)
- [ ] Improved efficiency compared to the current landscape
- [ ] A selection of fewer sectorial and synergetic partnerships selected competitively
- [ ] None of the above, satisfied with the status quo
- [ ] Other (specify below)

Please specify here:

Partnerships should be built on the joint preparation and active participation of all thematic stakeholders - industry, RTOs, universities, operators, service providers and member states, e.g. former European Technology Platforms such as ALICE, ERRAC and ERTRAC, Waterborne TP - in defining shared European strategic research, innovation and deployment agendas and technology roadmaps. These agendas should serve as the guideline for preparing annual work programmes, thereby ensuring alignment with European priorities and, consequently, with programme priorities and calls for proposals.

In addition, the end-user perspective and certification bodies must be included in partnerships (particularly in those established on a treaty basis) and the broader societal perspective taken into account. Participation in working groups and advisory bodies should be encouraged and incentivised so that, alongside industry, European research institutions and universities are also heard in the decisions of the Governing Boards. Finally, partnerships should promote specific European research, technology and innovation ecosystems by ensuring appropriate collaboration across the entire TRL chain among all stakeholders - industry, research organisations, universities and SMEs.

*** 2 - What are thematics* for which intervention through a European Partnership is essential, where the European Union's current and potential standing in the thematic area can be consolidated where strong relative to global competitors, including research excellence, industrial competitiveness, strategic autonomy, and ability to influence international standards and norms.**

**Thematics are policy-relevant themes or domains to be addressed through partnerships under Horizon Europe 28-34. Thematics reflect strategic R&I priorities, but do not necessarily require a stand-alone partnership. A thematic may be addressed by one or more partnerships. If a thematic area is not considered suitable for a partnership, either because it does not meet the criteria or is not prioritised, it may still be addressed through other Horizon Europe 28-34 instruments, including regular Work Programme calls. The absence of a partnership therefore does not*

imply a lack of funding opportunities.

Please justify:

The challenges ahead in the transport sector are inherently systemic: the performance of European transport systems depends on the interplay of modes, infrastructure, energy supply, port and logistics systems, workforce and the entire value chain from shipyards and manufacturers to operators and service providers. Electrification and hydrogen interlock with energy system integration and sector coupling; AI effects cascade across all modes, production, maintenance and operations; and assets with long service lives require coherent, long-term investment and interoperable standards. It is therefore essential that sector-specific partnerships also consistently take the systemic perspective into account right from the start.

Intervention through a European Partnership is justified in areas where added value is structural at European level. This is the case, where developing common, harmonised system solutions allows the Union to consolidate industrial leadership, cut lifecycle costs, and strengthen the competitiveness of its industry.

Such areas where Europe remains strong relative to global competitors are:

The European rail industry remains a world leader with significant socio-economic value and employment. Rail is also the only long-distance transport mode that is fully electrified and does not directly depend on fossil fuels. To maintain that position, the sector must significantly reduce investment, operation and maintenance costs while increasing capacity, without compromising safety and environmental sustainability. Against the backdrop of rising demand driven by geopolitical developments, this requires a major transition towards digitalisation and automation, as well as the rapid deployment of innovations to address current challenges such as capacity constraints, maintainability, reliability and workforce shortages. In addition, rail is indispensable for ensuring Europe's military mobility, particularly in the context of rapid and reliable cross-border movement. At a time when Europe's technological leadership is increasingly challenged by heavily subsidised international competitors investing on a larger scale, it is therefore essential to establish a Joint Undertaking for Europe's Rail to safeguard the EU's strategic technical and industrial leadership in this sector, its technological sovereignty, resilience and security, as well as the EU's climate objectives. In addition, rail transport is indispensable for meeting Europe's civil and military mobility needs, particularly in the central part of the continent.

The European shipping sector currently holds a leading position globally. The environmental and digital transformation of the shipping sector is uniquely complex: The assets have long service lives; ships operate worldwide under different regulatory frameworks and business models, rely on specialised fuels and equipment, and depend on interoperable port and logistics systems. Furthermore, the shipping sector encompasses an extremely diverse value chain, ranging from shipyards to equipment manufacturers, shipowners, ports, energy, infrastructure and service providers, right through to classification societies, 'blue economy' stakeholders and the wider research community. These characteristics require coordinated, large-scale investment in research, development and innovation (RD&I) to ensure climate neutrality, digital excellence, resilience, safety and security through European technological leadership. A partnership for technological leadership in the shipping sector, based on a work programme, would also facilitate the implementation of the EU's maritime industrial strategy and the EU ports strategy.

Hydrogen is a key energy vector for decarbonising sectors where electrification alone is technically or economically insufficient – notably steel, chemicals, refining, heavy-duty, maritime and aviation transport (including e-fuels and dual-use applications) – and for enabling sector coupling and long-term energy storage. The EU has already recognised hydrogen as a strategic asset for industrial competitiveness, technological leadership, resilience and economic sovereignty, underpinned by the Fit for 55 framework, the Hydrogen and

decarbonised gas market package (2024) and initiatives such as the Clean Hydrogen Partnership, IPCEI and the Hydrogen Bank. A partnership is needed to scale up competitive production and deployment at the scale required.

* 2.1 - Which of these should be addressed by Treaty-based partnerships and why?*

**As work programme-based partnerships are the default implementation mode, all identified thematic areas are implicitly considered candidates for this mode. This question seeks to identify which thematic areas, if any, would instead warrant implementation through a Joint Undertaking, as this requires an additional justification.*

A Joint Undertaking provides the governance continuity, stakeholder coordination and portfolio management capacity needed to maintain coherence across this interconnected ecosystem and over investment cycles that often extend beyond a decade. Co-Programmed Partnerships or fragmented Calls under different EU programmes are not sufficient to address the systemic nature of the challenges faced by the various European industry sectors. Moreover, fragmented calls or loosely coordinated initiatives risk creating bottlenecks between technological development, infrastructure readiness and market uptake. Supporting the ecosystems created in previous Joint undertakings like Clean Hydrogen and Europe's Rail with dedicated Joint Undertakings in the next MFF will create significant benefits for Europe's technological leadership, industrial competitiveness and strategic autonomy. Without a Joint Undertaking, research, demonstration and deployment activities would face the risk of being distributed across disconnected instruments and programmes, reducing coherence, efficiency and impact. The absence of a central coordination platform would also weaken the alignment of priorities across stakeholders and Member States.

More importantly, Europe should keep up the momentum and support its European hydrogen and rail ecosystems built over decades. The Joint Undertakings Clean Hydrogen and Europe's Rail have been dedicated strong public-private partnerships and were instrumental in mobilising private investment. The private members have notably invested substantially with In-Kind contributions (IKOP and IKAA), which are significantly higher than the EU contributions foreseen for the three Joint Undertakings. In the coming decades, stronger coordination and investment will be essential to maintain global leadership and strengthen strategic assets. Without this, the EU would risk losing ground in the global race in the hydrogen and rail sector as other regions are rapidly scaling investment, building integrated value chains and supporting domestic manufacturing. Without sustained and coordinated European action, technologies developed in Europe could be industrialised elsewhere, leading to increased dependency on external supply chains and erosion of European leadership. In such a scenario, Europe would risk becoming a market for imported technologies rather than a leader in their development and production.

The Joint Undertaking model offers several advantages that make it particularly suitable for hydrogen and rail. As a starting point, Joint Undertakings provide continuity and governance stability, which are essential for technologies requiring long-term investment cycles. Stable governance structures and long-term research and innovation programmes are critical to maintain multi-stakeholder confidence. Furthermore, the Joint Undertaking model creates shared ownership between public and private stakeholders, which in the case of the FCH/Clean Hydrogen and Shift2Rail/Europe's RAIL Joint Undertakings have fostered trust and sustained engagement across the various value chains and European institutions. Moreover, ownership was an

indispensable basis for all involved stakeholders where private investments were leveraged from European support.

Furthermore, cross-modal cooperation is critical for achieving transport system sustainability, as decarbonisation, efficiency and resilience depend on optimising the entire mobility and logistics network rather than individual modes. Transport should therefore be understood and addressed as an integrated system, with cooperation across modes as a core principle. This requires the establishment of appropriate interfaces between existing Joint Undertakings and other European Partnerships. Such interfaces would enable the alignment of research and innovation priorities, the exchange of knowledge and results, and coordinated action on cross-cutting issues such as digitalisation, AI, interoperability, multimodal logistics, energy, infrastructure resilience and sustainable fuels.

A cross-modal approach would also accelerate the deployment of digital and green technologies, strengthen network effects and improve the adaptability of the transport system to evolving societal, economic and environmental demands.

* 3 - What are thematics for which intervention through a European Partnership is essential, where the European Union's current and potential standing in the thematic area can be strengthened where weak relative to global competitors, including research excellence, industrial competitiveness, strategic autonomy, and ability to influence international standards and norms.

Please justify:

Intervention through a European Partnership is justified in areas where added value is structural at European level. This is the case, where developing common, harmonised system solutions allows the Union to consolidate industrial leadership, cut lifecycle costs, and strengthen the competitiveness of its industry. Beyond these economic imperatives, partnerships are essential in thematic domains where the EU’s current positioning is fragmented or strategically vulnerable compared to global competitors. In such areas, coordinated intervention is indispensable to safeguard strategic autonomy by mitigating critical dependencies, while simultaneously reinforcing Europe’s research excellence in frontier and high-risk technologies. Moreover, European Partnerships must serve as dedicated platforms to proactively shape international standards and regulatory frameworks, ensuring that European innovation ecosystems set the global benchmark rather than merely adapting to external norms. Ultimately, intervention is only justified where the scale, cross-border coordination, and multi-stakeholder commitment of a structured partnership are uniquely capable of bridging the gap between scientific discovery, regulatory alignment, and industrial deployment at a global level.

Europe’s automotive sector remains a strategic industrial pillar, yet it is undergoing a profound transformation driven by electrification and powertrain shift, digitalisation, automation as well as new mobility services. To preserve Europe’s industrial base, technological sovereignty and competitiveness, the EU must align public and private investment to accelerate innovation, strengthen supply chains, reduce dependencies on critical materials and technologies, and scale up manufacturing capabilities and skills in a coordinated way across the full TRL chain. Against this background, only a Joint Undertaking for the Automotive Sector can provide the strategic framework needed to seamlessly connect collaborative pre-competitive research, industrial innovation and market deployment in a coherent and long-term manner. Such an architecture would be particularly valuable in accelerating the development of electric and connected vehicles while ensuring their systemic

integration into the broader transport system through interoperable data ecosystems, energy systems, digital-physical infrastructure, and advanced mobility services. Such a systemic approach is essential for ensuring that European innovations are successfully deployed at scale and that Europe remains a global leader in future automotive and mobility systems rather than only in individual vehicle technologies. By establishing a Joint Undertaking for the Automotive Sector, Europe can ensure that innovation not only drives industrial impact but also delivers broader societal benefits, thereby accelerating market uptake and strengthening Europe's global competitiveness and strategic autonomy.

* 3.1 - Which of these should be addressed by Treaty-based partnerships and why?

Intervention through a European Treaty-based Partnership is justified in areas where added value is structural at European level. This is the case, where developing common, harmonised system solutions allows the Union to consolidate industrial leadership, cut lifecycle costs, and strengthen the competitiveness of its industry.

Acceleration towards market, Leverage effect of private investments, strategy autonomy and prevention of fragmentation (of solutions not programs), long term planning security and stability (taking into long term development and certification timelines) in the frame of a treaty-based partnership for automotive will help to improve the competitiveness of the European automotive sector.

* 4 - What are thematics for which intervention through a European Partnership is essential in order to address major societal, environmental, or systemic challenges of European relevance, where coordinated action at EU level is necessary to achieve sufficient scale, long-term structuring effects or cross-sectoral integration that could not be achieved effectively through fragmented national approaches alone?

Please justify:

As outlined, Europe faces enormous challenges in striking a balance between industrial competitiveness, the continent's sovereignty and decarbonisation. In general, several partnerships listed under question 2 and 3 are also addressing major societal, environmental, or systemic challenges of European relevance.

The European rail industry remains a world leader with significant socio-economic value and employment. Rail is also the only long-distance transport mode that is fully electrified and does not directly depend on fossil fuels. To maintain that position, the sector must significantly reduce investment, operation and maintenance costs while increasing capacity, without compromising safety and environmental sustainability. Against the backdrop of rising demand driven by geopolitical developments, this requires a major transition towards digitalisation and automation, as well as the rapid deployment of innovations to address current challenges such as capacity constraints, maintainability, reliability and workforce shortages. In addition, rail is indispensable for ensuring Europe's military mobility, particularly in the context of rapid and reliable cross-border movement. At a time when Europe's technological leadership is increasingly challenged by heavily subsidised international competitors investing on a larger scale, it is therefore essential to establish a Joint Undertaking for Europe's Rail to safeguard the EU's strategic technical and industrial leadership in this sector, its technological sovereignty, resilience and security, as well as the EU's climate objectives. In addition, rail transport is

indispensable for meeting Europe's civil and military mobility needs, particularly in the central part of the continent.

Europe's automotive sector remains a strategic industrial pillar, yet it is undergoing a profound transformation driven by electrification and powertrain shift, digitalisation, automation as well as new mobility services. To preserve Europe's industrial base, technological sovereignty and competitiveness, the EU must align public and private investment to accelerate innovation, strengthen supply chains, reduce dependencies on critical materials and technologies, and scale up manufacturing capabilities and skills in a coordinated way across the full TRL chain. Against this background, only a Joint Undertaking for the Automotive Sector can provide the strategic framework needed to seamlessly connect collaborative pre-competitive research, industrial innovation and market deployment in a coherent and long-term manner. Such an architecture would be particularly valuable in accelerating the development of electric and connected vehicles while ensuring their systemic integration into the broader transport system through interoperable data ecosystems, energy systems, digital-physical infrastructure, and advanced mobility services. Such a systemic approach is essential for ensuring that European innovations are successfully deployed at scale and that Europe remains a global leader in future automotive and mobility systems rather than only in individual vehicle technologies. By establishing a Joint Undertaking for the Automotive Sector, Europe can ensure that innovation not only drives industrial impact but also delivers broader societal benefits, thereby accelerating market uptake and strengthening Europe's global competitiveness and strategic autonomy.

One of Europe's key challenges is to reconcile the goal of climate neutrality by 2050 and the target of a 90% reduction in emissions by 2040 with the competitiveness of its industry. However, Europe's energy policy affects not only European industries and their competitiveness on a global level, but also every European citizen who wishes to be supplied with (clean) energy reliably and at affordable prices. In this respect, energy policy encompasses several dimensions: societal, economic and social. Specifically, Europe´s goal must be to create a healthier and safer future for Europeans and to ensure stable and secure jobs, in order to strengthen Europe's pioneering role in developing the markets for the clean technologies of the future. This goes hand in hand with the aim of making Europe more resilient and strengthening its strategic autonomy.

Furthermore, cross-modal cooperation is critical for achieving transport system sustainability, as decarbonisation, efficiency and resilience depend on optimising the entire mobility and logistics network rather than individual modes. Transport should therefore be understood and addressed as an integrated system, with cooperation across modes as a core principle. This requires the establishment of appropriate interfaces between existing Joint Undertakings and other European Partnerships. Such interfaces would enable the alignment of research and innovation priorities, the exchange of knowledge and results, and coordinated action on cross-cutting issues such as digitalisation, AI, interoperability, multimodal logistics, energy, infrastructure resilience and sustainable fuels.

A cross-modal approach would also accelerate the deployment of digital and green technologies, strengthen network effects and improve the adaptability of the transport system to evolving societal, economic and environmental demands.

* 4.1 - Which of these should be addressed by Treaty-based partnerships and why?

As before, treaty-based partnerships (see 2.1 and 3.1) are also to be included. The thematic focus is on inland transport – covering integration, electrification, automation and digitisation – its system aspects, and AI as a driver of breakthrough innovation, using real societal challenges to secure global leadership and demand-driven European competitiveness.

A Joint Undertaking (JU) is the only instrument capable of addressing the systemic nature of these challenges. Co-programmed partnerships or fragmented calls across EU programmes risk creating bottlenecks between technological development, infrastructure readiness and market uptake. JUs provide the governance continuity, stakeholder coordination and portfolio management needed to maintain coherence across this interconnected ecosystem over investment cycles that often extend beyond a decade. Unique JU features that no other instrument can adequately provide include knowledge exchange to public stakeholders, sharing of infrastructure, bridging the lab-to-market gap, leveraging resources, workforce development and integrating activities into the value chain.

Europe must keep the momentum of the transport and hydrogen ecosystems built over decades. Europe's Rail and Clean Hydrogen have been strong public-private partnerships instrumental in mobilising private investment – notably through in-kind contributions that significantly exceed the EU contributions foreseen for the three JUs. This shared public-private ownership fostered trust, sustained engagement and the leverage for private investment. Stable, long-term governance is essential for technologies with long investment cycles, and stronger coordination and investment will be indispensable in the coming decades to maintain global leadership.

Without dedicated JUs in the next MFF, research, demonstration and deployment would be scattered across disconnected instruments, weakening coherence, efficiency and cross-stakeholder alignment. As other regions rapidly scale investment, build integrated value chains and support domestic manufacturing, the EU would risk losing ground: technologies developed in Europe could be industrialised elsewhere, increasing dependency on external supply chains and eroding European leadership – turning Europe into a market for imported technologies rather than a leader in their development and production.

3. Questions about the respondent's involvement in European Partnerships

* 1 - What is the type of your organisation?

Maximum 1 selection(s)

- ☐ Academia
- ☐ Research and Technology Organisation
- ☐ Industry - large enterprise
- ☐ Industry - SME, including startup and scale up company
- ☐ Government body (Regulatory Authority, Ministry, Funding Agency, etc.)
- ☐ Other public entity
- ☐ Non-governmental organisation
- ☐ Individual EU citizen (no organisation)
- ☑ Other (please specify)

Please specify here:

Non for profit association

***2 - Has your organisation participated in a European Partnership?**

Maximum 1 selection(s)

- [x] Yes, as a partnership member
- [ ] Yes, as a beneficiary participating in a project funded by the partnership
- [ ] Yes, all of the above
- [ ] No, I have applied with no success
- [ ] No, I have not participated nor applied
- [ ] Don't know/ no answer
- [ ] Other (please specify)

Please specify here:

***If yes, in which European Partnership (several answer possible):**

[ ] Accelerating Farming Systems Transitions	[ ] Clean Hydrogen	[ ] Innovative Advanced Materials for the EU (IAM4EU)	[ ] Safe and Sustainable Food system
[ ] Agriculture of Data	[ ] Clean Steel - Low-carbon Steelmaking	[ ] Innovative Health Initiative	[ ] Single European Sky ATM Research 3
[ ] AI-Data-Robotics	[ ] Climate Neutral, Sustainable & Productive Blue Economy	[ ] Innovative SMEs	[ ] Smart Networks & Services
[ ] Animal Health & Welfare	[x] Connected and Automated Mobility	[ ] Made in Europe	[ ] Social Transformations and Resilience
[ ] BATT4EU	[ ] Driving Urban Transitions	[ ] One-Health Antimicrobial Resistance	[ ] Solar Photovoltaics
[ ] Biodiversa+	[ ] ERA for Health	[ ]	[ ]

		Pandemic Preparedness	Textiles of the Future
☐ Brain Health	☐ Europe's Rail	☐ Personalised Medicine	☐ Transformation of Health Systems
☐ Built4People	☐ European Metrology	☐ Photonics	☐ Virtual Worlds
☐ Chemicals Risk Assessment	☐ European Open Science Cloud	☐ Process4Planet	☐ Water4All
☐ Chips (formerly KDT)	☐ Forests and Forestry for Sustainable Future	☐ R&I in the Mediterranean Area (Prima)	☑ Zero-emission Road Transport
☐ Circular Bio-based Europe	☐ Global Competitive Space Systems	☐ Rare Diseases	☑ Zero-emission Waterborne Transport
☐ Clean Aviation	☐ Global Health Partnership	☐ Raw Materials for the Green and Digital Transition	
☐ Clean Energy Transition	☐ High Performance Computing	☐ Resilient Cultural Heritage	

Contact

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