

CBE JU SYNERGIES STRATEGY

June 2025

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1. INTRODUCTION

The Council Regulation establishing the Joint Undertakings¹ calls explicitly for close collaboration and synergies between Joint Undertakings and other relevant initiatives, so as to achieve maximum scientific, socioeconomic and environmental impacts². In particular, it requests that the JUs ***‘seek and maximise synergies with and, where appropriate, possibilities for further funding from relevant activities and programmes at Union, national and regional level, in particular with those supporting the deployment and uptake of innovative solutions, training, education and regional development, such as Cohesion Policy Funds, or the national Recovery and Resilience Plans’***³.

In addition, the JUs **Governing Boards** should help identify *‘the other European partnerships with which the joint undertaking shall establish a formal and regular collaboration and the possibilities for synergies between the joint undertaking’s actions and national or regional initiatives and policies based on information received by the participating states or the States’ Representatives Group as well as synergies with other Union programmes and policies.’*⁴

Moreover, the Commission, via its presence in the Governing Board, has a role in ensuring overall coordination and coherence between the JUs’ activities and the activities of the Union funding programmes, in order to promote synergies and complementarities, while avoiding duplications⁵.

In this context, the CBE JU is expected - in line with the available resources - to foster synergies at two level as presented in the following figure:

A) European level with:

- I. other parts of Horizon Europe programme, including Cluster 6 activities, the HE Missions, relevant co-programmed/cofounded and institutionalised partnerships, etc...
- II. other Union programmes and funding instruments, especially those supporting the deployment of innovative solutions, education and regional development, in order to increase economic and social cohesion and reduce imbalances⁶;

B) National and Regional level with relevant programmes such as Cohesion Policy Funds, and the National Recovery and Resilience Plans.

In this document, the analysis of all relevant synergies for the CBE JU is presented together with the identified possible actions.

¹ Council Regulation (EU) 2021/2085 of 19 November 2021

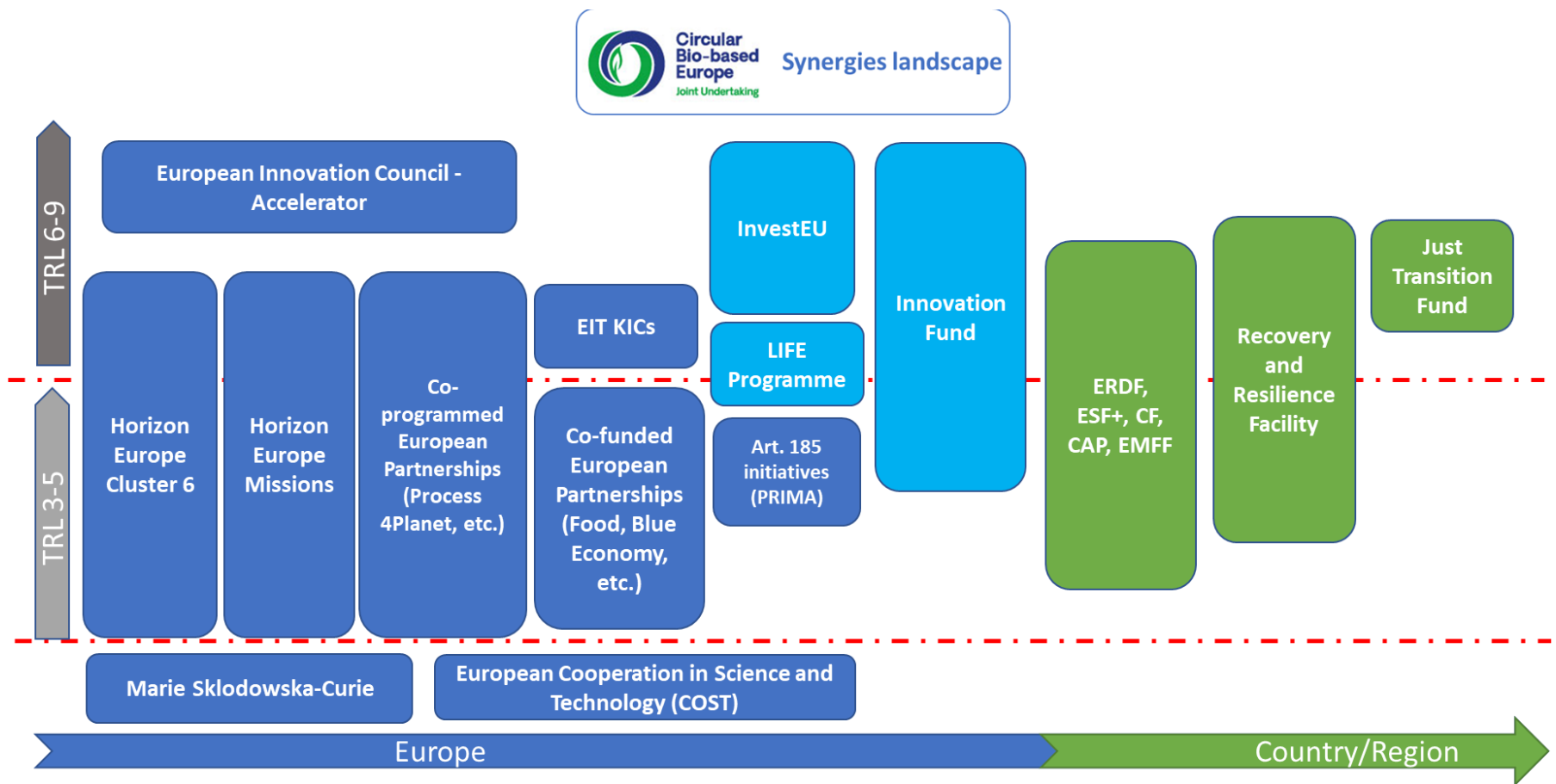
² Preamble §14 of the Council Regulation (EU) 2021/2085 . For this purpose, the joint undertakings may apply Horizon Europe provisions enabling different types of synergies, such as alternative, cumulative or combined funding and transfer of resources.

³ Art. 5.2(c) Council Regulation (EU) 2021/2085

⁴ Art. 17.2(j) Council Regulation (EU) 2021/2085

⁵ Art. 17.1 Council Regulation (EU) 2021/2085

⁶ Preamble §10 of the Council Regulation (EU) 2021/2085



- **blue**, actions implemented in the frame of Horizon Europe
- **light blue**, actions implemented at European level but not linked to HE
- **green**, actions implemented at national and/or regional level

2. OPPORTUNITIES AND BOTTLENECKS

Promoting an integrated approach and strengthening synergies between key EU and national programmes (and their respective policy objectives) can offer new win-win opportunities to promote a smart and sustainable economic transformation as well as to foster excellence in research and innovation. Strategic alignment within Horizon Europe, as well as between Horizon Europe and shared management funds is necessary to ensure that resources are used efficiently and that programmes contribute to the overarching goal of European competitiveness.

Collaboration across institutions, governmental entities, and R&I sectors is vital for successful synergy implementation. By working together, stakeholders can leverage their strengths, share knowledge, and coordinate efforts to maximise the impact of EU investments in research and innovation.

- At European level, synergies can be fostered to obtain scale-up of innovation, such as for example moving from research demonstration to innovation deployment and ultimately market roll-out by addressing specifically different pillars/programmes, within or outside the Horizon Europe framework. Furthermore, synergies can promote complementarities among innovation results whilst working in the same thematic or geographical area by tackling issues from different perspectives.
- On the other hand, synergies between Horizon Europe and cohesion policy programmes are essential for addressing the innovation divide across Europe. The concept of shared management is central to EU budget expenditure, with Member States managing a significant portion of funds. This approach allows for tailored regional strategies that align with broader European objectives, ensuring that investments are responsive to local needs while contributing to EU-wide goals. Furthermore, these synergies may enable widening countries to catch up in their research and innovation performance, fostering a more balanced and competitive European landscape.

However, implementing synergies requires overcoming several barriers, including mismatches in thematic priorities and funding mechanisms. Some are the main obstacles and barriers that have been mapped in the preliminary study conducted by CBE JU are:

1. At EU level, the fragmentation among different institutions responsible for the development and establishment of the funding programmes create a complexity in the coordination and effective implementation of synergies. Cooperation across programmes requires a thorough knowledge of the policy scenario that is governing the relevant sectors and a commitment in establishing mechanisms and procedures for a successful cooperation is a key element for success.
2. Aligning regional and European approaches is crucial to ensure that programmes complement each other and address common challenges effectively. Smart Specialisation Strategies play a pivotal role in bridging Horizon Europe and cohesion policy programmes. These strategies provide a framework for regions to identify and build on their unique strengths, facilitating targeted investments and collaborations that enhance innovation capabilities. However, the capacity of dialoguing with a multitude of different funding authorities responsible for the Smart Specialisation Strategies and for the release of the locally relevant funding calls is a critical step which require efforts and commitment from both sides.
3. At national and regional level, major barriers still occur due to the mismatches of different funding rules and legal arrangement present in the national and regional programmes compared to the European ones. In particular, difficulties have been mapped in relation to the implementation of mechanisms, like the seal of excellence or sequential funding, due to the nature of consortium vs single beneficiary funding criteria.

3. SYNERGIES AT EUROPEAN LEVEL

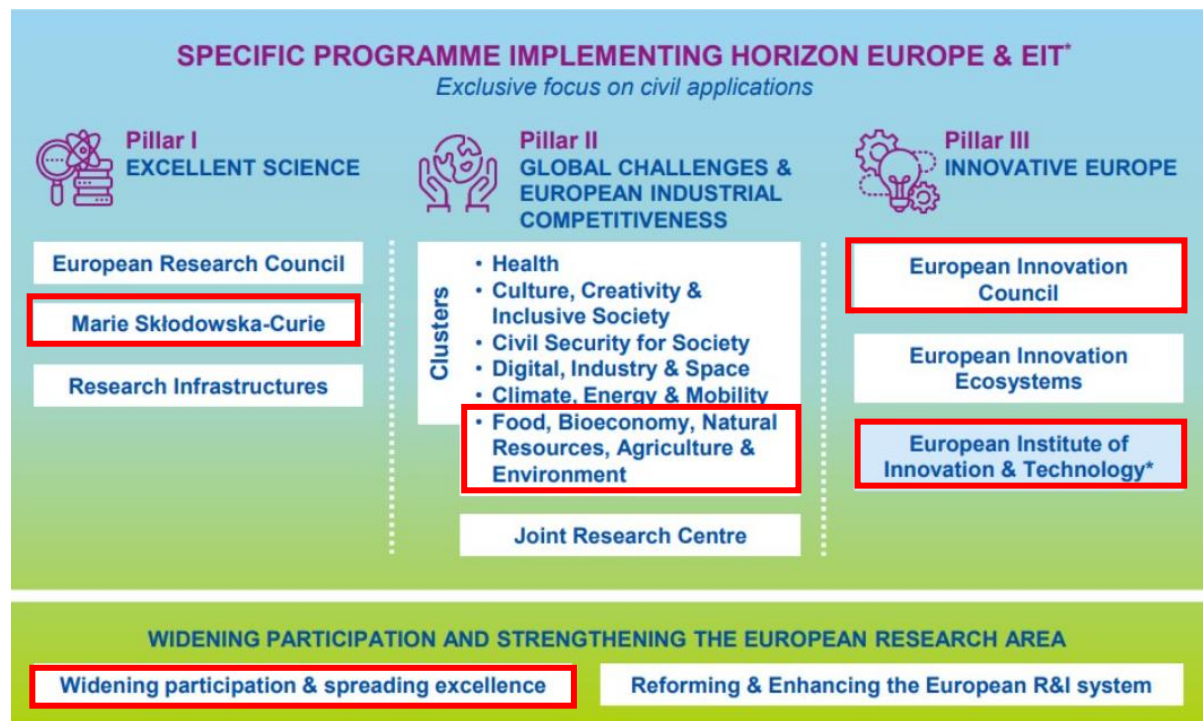
Synergies with European programmes and/or other EU instruments can take different forms and can range from simple information exchange to strategic coordination and co-programming. The main types of possible actions can be:

- **Strategic planning:** Defining ex-ante priorities for collaboration with other HE Partnerships, the HE Missions and other parts of Pillar II (i.e., Cluster 6), as well as foster strategic exchanges to define joint activities and/or foresight exercises to help aligning agendas by, in the Horizon Europe endeavor, alignment of the Strategic Research and Innovation Agendas (SRIAs) and Multi-Annual programmes.
- **Coordinated programming:** Understanding the role and contribution of each instrument/programme should avoid duplications and ensure actions funded via different programmes are complementary and produce mutually beneficial outcomes, including a wider participation to the programmes. This could entail:
 - **Coordinated calls**, which are different calls with *separate* budgets managed by different entities, but with focus on achieving a common objective or a mutually beneficial solution.
 - **Joint calls**, where multiple programmes will contribute to a *single* call to achieve an outcome mutually beneficial to all participating programmes⁷. This however entails the transfer of budget from one programme/entity to another with all the related complexity associated to it.
 - **Join mechanisms to ensure the wider participation to the programmes**, based on their respective features and specificity by thoughtfully target sectorial communities or specific consortia of beneficiaries. In particular, this action is relevant because different programmes may address similar thematic areas or have similar objectives but based on different specificities and features, i.e., different TRLs or focus on territorial deployment.
- **Portfolio level:** Establishing regular and structured information exchange among implementing bodies on their related portfolios of projects by sharing portfolio data, organising thematic workshops and meetings, fostering networking of project partners in similar area of research & innovation, etc..
- **Outreach and dissemination:** Producing greater understanding of opportunities offered by different and/or complementing actions. This might be achieved by sharing information to broader audiences, showcasing respective results on web sites and platforms, fostering joint activities to develop the national/regional ecosystems, fostering dedicated info days and participation of different programmes stands in CBE JU annual info day.

⁷ Note: blended calls are well established in some programmes. They have well established governance and discussion fora

Horizon Europe

Cooperation and synergies between CBE JU and other part of the **Horizon Europe (HE)** programme can be envisaged at programming level as well as at portfolio management level, via strategic alignment, information sharing, and creating of joint initiative. In the figure below, the parts of the HE programme highlighted in red should be considered in priority, together with the Missions and other Partnerships.



Pillar II

Cluster 6 on Food, Bioeconomy, Natural Resources, Agriculture & Environment

CBE JU is one of the Institutionalised Partnerships set under the Cluster 6 and, therefore, cooperation and synergies are paramount to reach the expected impacts of the underlying policy priorities and are mainly implemented as following.

- **Programming level**, through its Governing Board and in particular the EC representatives from DG RTD and DG AGRI, CBE JU seeks continuous synergies with Cluster 6 to ensure the CBE JU Annual Work Programmes are thematically complementary and no duplicating actions are funded or will be funded in the Cluster 6 Work Programmes and vice-versa.
- **Portfolio level**, by fostering exchange of information with relevant executive agencies on projects in similar areas of interventions, i.e., the Community of Practice ECOSYSTEX in the textile sector promoted by REA and supported by HaDEA and CBE JU gathering projects funded by the different Clusters and CBE JU and working to different aspects of the textile sector.

Horizon Europe Missions

Missions are a novelty of the Horizon Europe programme for the years 2021-2027. They are a coordinated effort by the EC to pool the necessary resources in terms of policies and regulations, as well as other activities to support Commission priorities including the European Green Deal.



Among the EU Missions, CBE JU signed the charters for:

- [Restore our Ocean and Waters by 2030](#), as this mission aims, among other objectives, at developing a sustainable carbon-neutral and circular blue economy.
- [A Soil Deal for Europe](#), as among its specific objectives, this mission aims at improving biodiversity and reducing soil pollution to enhance soil restoration.

- **Programming level**, through its Governing Board and in particular the EC representatives from DG RTD and DG AGRI, CBE JU seeks synergies with HE Missions to ensure thematic alignment of the respective Work Programmes and avoiding overlaps.

- **Portfolio level**, CBE can support Missions' objectives by sharing information on relevant CBE projects', by fostering mutual learning and networking to ensure multistakeholder engagement.

- **Outreach and dissemination level**: the Missions and CBE JU can mutually promote the programmes within their respective communities to foster engagement and capacity building to potential scale-up of projects' results.

Horizon Europe Partnerships

Among the HE Partnerships, the ones that share common policy objectives, thematic areas, and community of stakeholders with CBE JU, are highlighted in the picture below in red. These partnerships are particularly relevant for CBE JU since they are addressing in their respective SRIAs aspects of the bioeconomy that are relevant for the scope of CBE JU, i.e., marine resources, food and feed production, circularity and resource efficiency in agriculture, etc... In the following figure⁸, the most thematically relevant partnerships for CBE JU are highlighted in red.



Also, public-public partnerships established according to Art. 185 TFEU are considered, such as PRIMA: Research and Innovation in the Mediterranean Area, that is thematically relevant for CBE JU addressing agricultural, food and water-related topics.

- **Strategic level**, by ensuring alignment of the respective objectives and SRIAs.
- **Programming level**, by identifying areas in which complementary calls could be considered to address more effectively and efficiently common challenges, by selecting projects that address same aspects but, for example, at different TRLs.
- **Portfolio level**, by ensuring access to results and other relevant info to ensure knowledge exchange among partnerships.

⁸ [European Partnerships in Horizon Europe](#)

Pillar I

Marie Skłodowska-Curie – Staff Exchange action

The MSCA [Staff Exchange action](#) funds short-term international and inter-sectoral exchanges of staff members involved in research and innovation activities with the aim to develop sustainable collaboration between academic and industries (in particular SMEs). CBE JU and MSCA have very complementary constituencies, and CBE JU due to its interdisciplinarity and high rate of participation of SMEs, is an ideal partner for Staff Exchange action which foresees 20% of its budget dedicated to funding private companies.

Outreach and dissemination level: by promoting MSCA Staff-exchange calls withing CBE JU community and inviting MSCA to be present with a stand in CBE JU annual info day.

Pillar III

European Innovation Council (EIC)

The EIC supports game changing innovations from early-stage research to proof of concept, technology transfer, and the financing and scale up of start-ups and SMEs. Among the EIC Funding opportunities, the [Accelerator](#) offers up to €2.5 million of grants, up to €15 million of equity investments, as well as coaching & mentoring, and networking. Therefore, complementarity could be fostered between the CBE JU and the EIC Accelerator in terms of fundings and support offered to highly innovative SMEs aiming to the upscale of bio-based solutions, as both initiatives support innovations and the financing and scale up of SMEs.

Programming level, via an agreed joint mechanism to ensure complementary in terms of fundings, and support to SMEs participating in both programmes. For example, highly innovative SME active in CBE projects could access the EIC Accelerator via a Fast track procedure.

Horizontal pillar

European Cooperation in Science and Technology (COST)

COST is an EU-funded intergovernmental framework, composed by 41 member countries, which funds interdisciplinary and open research networks (COST Actions) to help excellent researchers and innovators get access to the European and international research communities. In particular, the activity of COST in widening countries is very relevant for CBE JU under the umbrella of the CBE JU widening strategy.

Outreach and dissemination level: to encourage COST applicants/participants from widening countries to apply in future CBE JU calls, to create networking opportunities among COST & CBE JU respective beneficiaries, with the ultimate goal of achieving higher impact in future capacity building activities organised by both entities. Also, inviting COST to be present with a stand in CBE JU annual info day.

Other relevant Union programmes and funding instruments

InvestEU programme and its Fund

The [InvestEU programme](#) supports sustainable investment, innovation and job creation in Europe providing long-term funding by leveraging private and public funds and helping to mobilise private investments for the EU's top policy priorities (such as the green, and digital transition, innovation and social investments and skills).

The [InvestEU Fund \(2021-2027\)](#), an important part of the Green Deal Investment Plan, supports four policy windows (sustainable infrastructure; research, innovation and digitalisation; SMEs and social investments and skills), focusing on investments where the EU can add the most value. The InvestEU Fund is implemented through financial partners (the “implementing partners”) that will invest in projects, benefitting from the protection of EU budget guarantee. The main partner is the EIB Group, and for the first time, the EU guarantee is open also to national promotional banks and international financial institutions, such as the European Bank for Reconstruction and Development.

Outreach and dissemination level: Synergies with InvestEU could provide CBE JU beneficiaries, especially those engaged in Flagships or Demo projects, alternative financing opportunity to allow them to take the extra step needed to reach the market. Blending approaches may be promoted to combine, for example, loans for infrastructure from InvestEU with CBE grants, to develop especially large-scale bio-refineries.

Innovation Fund

The [Innovation Fund](#) is the EU fund for climate policy and one of the world's largest funding programmes for the demonstration of innovative low-carbon technologies with a focus on energy and industry. It aims to bring to the market solutions to decarbonise European industry and support its transition to climate neutrality while fostering its competitiveness. It is managed by CINEA under the policy lead of DG CLIMA.

- **Portfolio level**, by sharing information of respective projects' portfolios where the mutual learning and networking can be useful for multistakeholder engagement and potential scale-up of projects' results.
- **Outreach and dissemination level**, by mutually promoting the programmes within their respective communities and beneficiaries.

LIFE programme

The [LIFE programme](#) EU's funding instrument for the environment and climate action, managed by CINEA. The LIFE programme as a whole constitutes a 100% contribution to the objectives and targets of the European Green Deal. It is the only EU programme dedicated exclusively to the environment, nature conservation and climate action and the budget invested for the years 2021-2027 is 5.43 billion €.

The LIFE Programme is structured into two fields – Environment and Climate Action – and four sub-programmes.

- Under the Environment field, sub-programmes are: « Nature and Biodiversity » and « Circular Economy and Quality of Life ».
- Under the Climate Action field, sub-programmes are «Climate Change Mitigation and Adaptation» and «Clean Energy Transition».

CBE JU could seek potential synergies with this programme particularly with the « Circular Economy and Quality of Life » and the «Climate Change Mitigation and Adaptation» sub-programmes which aims at facilitating the transition toward a sustainable, circular, energy efficient and climate-resilient economy, a toxic-free environment and at protecting, restoring and improving the quality of the environment.

- **Portfolio level**, by sharing information of respective projects' portfolios where the mutual learning and networking can be useful for multistakeholder engagement and potential scale-up of projects' results.
- **Outreach and dissemination level**, by mutually promoting the programmes within their respective communities and beneficiaries.

Other relevant EU policy initiatives

Enterprise Europe Network

The [Enterprise Europe Network \(EEN\)](#) is an initiative of the European Commission, designed to help SMEs innovate and succeed by providing a local gateway to global business opportunities. It is the world's largest support network for SMEs with offices in all regions of the EU Member States (plus Norway and Iceland). It was launched by the European Commission in 2008, and it is funded through the Single Market Programme (SMP) and implemented by the European Commission's European Innovation Council and SMEs Executive Agency (EISMEA).

Outreach and dissemination level, Considering the importance of SMEs in the CBE JU programme, CBE JU could seek potential synergies with the EEN in order to further enhance SMEs participation in the calls and ensure an engagement of the community of SMEs reached by EEN that have direct interests in the bioeconomy sector.

New European Bauhaus (NEB) initiative

The New European Bauhaus initiative connects the European Green Deal to our daily lives and living spaces. The initiative draws funds from several EU financial instruments to support beautiful, sustainable, and inclusive projects. The European Commission is currently considering the launch of the NEB Facility, structuring the initiative and its funds along a pathway from research to implementation. There is increasing awareness of biobased materials in the initiative, and with it come growing opportunities for synergies.

Outreach and dissemination level, to encourage the NEB community to apply in future CBE JU calls or use CBE JU-supported innovations that are already available. Crosslinking the CBE JU with the NEB communities could leverage the use of new biobased materials in construction.

4. SYNERGIES WITH NATIONAL AND REGIONAL PROGRAMMES

The synergies with national and regional fundings cover mainly the following two dimensions:

➤ Upstream synergies

Typically include developing research infrastructure and support to help R&I stakeholders to prepare project proposals for submission to the competitive calls for projects under Horizon Europe, including instruments like CBE JU. This kind of synergies have been proven particularly relevant for Member States that have a persistently low rate of participation in the Framework Programmes, especially in terms of approved projects.

Currently, EC has started enhanced dialogues with MS: 7 MS are working on enhanced synergies (Croatia, Czechia, Estonia, Greece, Latvia, Lithuania, Slovenia plus Spain ongoing) and in June 2023, launched a new network [“R&I and Cohesion Managing Authorities Network” \(RIMA\)](#) to exchange experience and good practices in relation to policy developments in R&I and cohesion, and to support coordination at regional and national level in relation to the research funding. The group is jointly chaired by DG RTD, DG REGIO and a Member State (Czech Republic).

➤ Downstream synergies: the seal of excellence

The *Seal of Excellence*, a quality label first introduced during Horizon 2020. Currently, it might be awarded to project proposals submitted under a Horizon Europe call for proposals and ranked above a predefined quality thresholds but not funded due to budget limitation.

The Seal of Excellence has been implemented in a number of calls under EIC Accelerator and Transition (only individual SME applicants are eligible for Seal of Excellence); MSCA postdoctoral fellowships and COFUND; Teaming and ERC Proof of Concept. First tentative to expand the Seal of Excellence to collaborative projects have been recently undertaken e.g. in the [Mission on Adaptation to Climate Change](#) with the [HORIZON-MISS-2022-CLIMA-01-06 topic](#), but without successful results.

Seal of Excellence projects do not have to go through a regular ERDF project selection process. They must nevertheless undergo at least a simplified assessment to ensure that the operations meet the requirements set out in points (a), (b) and (g) of Article 73(2) Common Provision Regulation, as set out by Article 73(4) Common Provision Regulation⁹.

In this framework, the **CBE JU States Representatives Group (SRG)** has a key role to play supporting synergies with national & regional financing instruments and programmes. In particular, the Council Regulation¹⁰ foresees that the SRG shall:

- Art. 20(10): submit a yearly report describing the national or regional policies in the scope of the JU and identifying specific ways of cooperation with the actions funded by the JU.
- Art. 20(9) where applicable, regularly report to the GB and act as an interface with the JU on relevant national or regional R&I programmes or specific measures with regard to (among other): deployment and uptake of relevant technologies and innovative solutions; deployment activities in relation to CBE JU; dissemination events, technical workshops and communication activities.

⁹ <https://eur-lex.europa.eu/eli/reg/2021/1060/oj/eng>

¹⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A32021R2085&from=EN>

Regional and National level implementation of European Structural and Investment Funds (ERDF, ESF+, CF, CAP, EMFF)

Research and Innovation is a major priority of the European Structural and Investment Funds, and the bioeconomy is a key area for Smart Specialisation Strategy in most of the European regions irrespectively of the presence of a national bioeconomy strategy.

The new rules establishing HE makes it easier to pool ERDF and HE funds in co-funded actions, thereby creating opportunities for the regions to team up with other EU countries and regions to address related smart specialisation priorities. The main gain is the opportunity to increase the participation of less developed regions and Member States in transnational collaboration within the partnerships framework. The co-funding provided by the EU through partnerships can therefore create particular added value when the priorities identified under HE and through S3 correspond to or complement each other.

The European Court of Auditors is also supporting the design of action to create downstream synergies between Horizon Europe and European Regional Development Funds to support the further deployment of innovation results in HE funded projects, which might well align with the specificities of CBE JU.

- **Upstream synergies** to enhance capacity building and provide trainings to enhance the participation from the regions identified in the CBE Widening strategy as less developed and in transition. CBE JU could seek potential synergies with Managing Authorities and national/regional stakeholders to identify R&I priorities in programmes in compliance with S3 priorities and to identify potential applicants from Widening regions to have a support for the development of strong proposals.
- **Downstream synergies:** potential interest by regions has been expressed, i.e. Italy (Toscana, Task Force of Italian Regional Bioeconomy Strategy), to explore the possibility to apply the Seal of Excellence in CBE JU Flagship topics.

Recovery and Resilience Facility (RRF)

The RRF is a temporary instrument that is the centrepiece of NextGenerationEU - the EU's plan to emerge stronger and more resilient from the current crisis. Through the Facility, the EC raises funds by borrowing on the capital markets (issuing bonds on behalf of the EU). These are then available to its Member States, to implement ambitious reforms and investments that make their economies and societies more sustainable, resilient and prepared for the green and digital transitions, in line with the EU's priorities.

Upstream synergies with national Managing Authority of the RRF to explore the potential use of NextGeneration EU to foster territorial deployment of biorefineries funded or presented to CBE JU.

Just Transition Fund (JTF)

The Just Transition Fund is the first pillar of the Just Transition Mechanism (JTM). It is a key tool to support the territories most affected by the transition towards climate neutrality providing them with tailored support. It is implemented under shared management, under the overall framework of Cohesion policy, which is the main EU policy to reduce regional disparities and to address structural changes in the EU.

Upstream synergies with national Managing Authority of the Just Transition Fund to explore the potential use of this fund to foster territorial deployment of biorefineries funded or presented to CBE JU.

5. ANNEX 1 – WHAT KIND OF SYNERGIES FOR EACH EU LEVEL INITIATIVES

Initiative	Strategic planning	Coordinated programming	Portfolio level	Outreach and dissemination
Horizon Europe Cluster 6		X	X	X
Horizon Europe Missions		X	X	X
Horizon Europe Partnerships	X	X	X	X
Marie Skłodowska-Curie				X
European Cooperation in Science and Technology (COST)				X
European Innovation Council		X	X	
Innovation Fund			X	X
LIFE Programme			X	X
InvestEU				X
European Enterprise Network				X
New European Bauhaus				X

6. ANNEX 2 – WHAT KIND OF SYNERGIES FOR EACH NATIONAL/REGIONAL LEVEL INITIATIVES

Initiative	Upstream synergies	Downstream synergies
European Rural Development Fund	X	X
European Social Fund+	X	X
Cohesion Fund	X	X
Common Agricultural Policy	X	X
European Maritime and Fisheries Fund	X	X
Recovery and Resilience Facility (RRF)	X	
Just Transition Fund	X	