European Partnership on Social Transformations and Resilience
under Horizon Europe

Draft proposal
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Contents

1 General information

1.1 Draft title of the European Partnership
Social Transformations and Resilience Partnership

1.2 Lead entity
National Science Centre (NCN), Poland.

1.3 Commission services

DG EMPL F3 'Fair Green and Digital Transitions, Research' unit.

1.4 Summary

The Partnership will create a transformative R&I programme with, but not limited to, the social sciences and humanities (SSH) to explore and make use of their potential to strengthen resilience, fairness, inclusiveness, and social cohesion in the light of changes in climate and environment, technology, demography, and unexpected shocks. It will contribute to policy solutions at European, national, and regional level by developing knowledge, tools and innovative solutions to address contemporary social challenges in a collaborative, inter- and trans-disciplinary and systematic way.

2 Context, objectives, expected impacts

2.1 Context and problem definition

2.1.1 Drivers of social transformation: the need for social resilience in welfare states, education, work and a fair transition towards climate neutrality

Europe is undergoing critical social transformations driven by macro drivers of change, such as the green and digital transitions, demographic change, which were accelerated by events, such as the COVID-19 pandemic and Russia's war of aggression against Ukraine. These transformations bring challenges and opportunities such as changing skill demands and labour shortages, new digital and intergenerational divides, increasing inequalities and threats to social cohesion, and rising costs of social protection, among others. While the EU labour market proved to be remarkably resilient in the face of the impact of Russia's war on Ukraine, EU societies and individuals nevertheless had to deal with a surge in cost of living and energy prices,[1] which was particularly felt by lower income households and stirred socio-political tensions. Similarly, effects of the COVID-19 pandemic are still felt, as the recovery was not evenly spread, with some countries in the EU recovering faster than others. Young people find themselves in more volatile situations, struggle to find jobs that match their skills, and worry

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[1] European Commission, Directorate-General for Employment, Social Affairs and Inclusion, *Employment and social developments in Europe 2022*, Publications Office of the European Union, 2023.

more about finding adequate housing in the next ten years.[2] While exacerbated by the COVID-19 pandemic, the challenges outlined above extend beyond the pandemic and require **comprehensive and sustained attention.**[3]

If not addressed properly, these structural challenges to the European social and economic model could widen existing inequalities, impede behavioural change, erode trust and public support for scientific and policy solutions, and even damage the fabric of our democracies. If addressed properly, this 'era of profound change – for our society and our security, our planet and our economy'[4] will turn threats into opportunities for a fairer, greener and more prosperous future. As mentioned in the political guidelines of the next European Commission 2024 – 2029:

'The speed of change can be destabilising and, for some, can lead to a sense of loss for the world as it used to be and a worry for the world as it will be.'[5]

In the context of this Partnership, **transformations** are understood as long-term system shifts, both experienced and shaped by social actors, that relate to the whole of society. They are fundamental and long-term processes arising from and affecting natural, political, economic, technological, social, and cultural areas. Transformations[6] question current structures, bring along uncertainties, need learning and searching for possibilities to proactively shape ongoing processes, including behaviour change and values. While transformations entail both challenges and opportunities to societies and their citizens, their benefits and disadvantages are often unequally distributed and result in tensions and conflicts. In democratic societies, transformations require consultation, coordination, and negotiation between all actors to agree on measures and solutions that not only build conditions for **resilience** in the society but enable a fair adaptation to the changes.

The concept of **resilience** has evolved from various academic disciplines and applications, from strictly engineering and disaster risk management related notions, focusing on the adaptability, robustness and rapidity of recovery of infrastructures, to the idea of social resilience, which centres more around actors, power relations and the adaptability of societies to major crises.[7] In fact, more critical understandings of resilience increasingly move away from the concept centred around an individual's capacity to survive crises and overcome adversity, and focus more on systemic problems and structural interventions that are needed to

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[2] European Commission, Directorate-General for Employment, Social Affairs and Inclusion, *Employment and social developments in Europe 2022*, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2767/229768

[3] European Commission, Directorate-General for Employment, Social Affairs and Inclusion, *Employment and social developments in Europe 2022*, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2767/229768

[4] Europe's choice. Political guidelines for the next European Commission 2024−2029, Ursula von der Leyen.

[5] Ibid.

[6] While in sociology 'social transformations' are frequently understood as the restructuring of different aspects of life by individual actors and communities (see e.g. Rabie, M. (2013). Social Transformation. In: Global Economic and Cultural Transformation. Palgrave Macmillan, New York.)), the STR Partnership takes a more systemic perspective.

[7] Manca, Benczur and Giovannini, Building a scientific narrative towards a more resilient EU society, Part 1: a conceptual framework, 2017, EUR 28548 EN, doi:10.2760/635528

address social vulnerabilities and inequalities.[8] As concerns climate change, which is one of the social challenges this Partnership aims to address, scholars have questioned the trade-offs to be made for maintaining the resilience of an ecological system at the cost of other social systems, and particularly disadvantaged groups therein.[9] Therefore, in the context of fostering a fair green transition, it is particularly important to consider the tensions and potential paradoxes arising from efforts to strengthen socio-ecological resilience.

For the purpose of the Social Transformations and Resilience Partnership (STR), **resilience** is to be interpreted as the ability of institutions and societies to adapt and respond to change in a constructive manner, which includes mobilising resources and developing strategies of shaping transformation processes. We see resilience as a process and evolution and as a capacity, which institutions, public services, and societies need to develop to be able to cope with uncertainties and adverse events.

Given the STR Partnership's focus on strengthening resilience, fairness, inclusiveness, and social cohesion in the light of social transformations, examining the impact on disadvantaged and marginalised communities is central to the partnership's research activities. In EIGE's broad definition, **disadvantaged groups** are understood as groups of persons experiencing 'a higher risk of poverty, social exclusion, discrimination and violence, than the general population, including, but not limited to ethnic minorities, migrants, persons with disabilities, isolated elderly people and children.'[10] These disadvantages may differ and compound depending on intersecting factors, such as gender, geographic location, social and economic status, ethnicity, and sexual orientation. They are also context-specific and may manifest themselves in greater obstacles to success or access to resources, services, and opportunities.[11] Against this backdrop and aiming at contributing to a fair and sustainable social transformation, this Partnership is targeting four interlinked policy areas of **social protection systems, working life, education and skills, and green transitions**. The following section explains in more detail the scale of the problems in the four impact areas and the strategic opportunities which the STR Partnership aims to tackle.

Social Protection and essential services:[12]

Social protection systems are the cornerstone of the European social model and of a well-functioning social-market economy as they protect people against illness, old age, accidents at work and job loss, and prevent and alleviate poverty. Well-designed social protection systems facilitate participation in the labour market and contribute to competitiveness and sustainable

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[8] Suslovic B, Lett E. Resilience is an Adverse Event: A Critical Discussion of Resilience Theory in Health Services Research and Public Health. Community Health Equity Res Policy. 2024 Apr;44(3):339-343.

[9] Chelleri, L., Waters, J. J., Olazabal, M., & Minucci, G. (2015). Resilience trade-offs: Addressing multiple scales and temporal aspects of urban resilience. *Environment and Urbanization, 27*(1), 181–198.

[10] EIGE, Glossary (2016): https://eige.europa.eu/publications-resources/thesaurus/terms/1174?language_content_entity=en

[11] Oxford review: Diversity, Equality and Inclusion Dictionary https://oxford-review.com/the-oxford-review-dei-diversity-equity-and-inclusion-dictionary/disadvantaged-groups-definition-and-explanation/

[12] High-Level Group on the Future of Social Protection and of the Welfare State in the EU, The future of social protection and of the welfare state in the EU - Publications Office of the EU, 2023

growth as they support investment in human capital and can help to reallocate human resources towards emerging and dynamic sectors of the economy.[13]

While the European welfare states differ in their historic development and guiding principles, they are all facing similar challenges: **increase in demand, rising costs, fragmentation[14] and inequalities in access.** Historically, welfare state development has occurred due to and in response to economic, demographic, and social challenges and crises. At the current juncture there are again pressing needs for adaption and development. Citizens expect and require support and services across the life cycle and European competitiveness is dependent on a well-educated population and sustainable social security systems that support citizens.

In the long run, the gaps in access to social protection could put at risk the welfare and health of individuals and contribute to increasing economic uncertainty, the **risk of poverty** and inequalities. Such gaps could also lead to suboptimal investment in human capital, reduce trust in institutions and limit inclusive and ecologically sustainable economic growth.[15]

Structural reforms are especially important in the face of **geo-political tensions**, climate change and demographic change. The European Pillar of Social Rights provides a framework that Member States can follow, thereby achieving a common direction in the welfare state development even though these questions are largely decided at member state level. Given the **diversity of welfare state solutions** across Europe in view of globalized economy there is a strong need for collaboration and interchange of ideas across Member States, and to that effect learning from past experiences, generating new ideas, new research and social innovation are much needed.

Social protection and essential services systems need to be sustainable, adaptable, and capable of fulfilling their purpose and handle both long-term challenges and occasional shocks that will differ in type and effect. The current times pose new challenges to the governance of welfare policies. Policies are becoming more complex and mutually dependent; and governance must respond in a more agile and timely way to the different crises and emerging problems.[16] We need to develop a more integrated understanding of policy outcomes and how social policy can be used to increase resilience and reduce inequalities in people´s wellbeing within planetary boundaries.

Future of Work:
The twin digital and green transitions, demographic changes and social and geo-political crises create both major opportunities and challenges for the future of work, affecting both the quantity and quality of work. Understanding these effects is of primary relevance both for policy makers and stakeholders.

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[13] 2019 Council recommendation on access to social protection
[14] Allard, Scott W., 'The Politics of a Fragmented Welfare State', *Out of Reach: Place, Poverty, and the New American Welfare State* (New Haven, CT, 2008; online edn, Yale Scholarship Online, 31 Oct. 2013), https://doi.org/10.12987/yale/9780300120356.003.0006
[15] Ibid.
[16] High-level group report on the future of the welfare state and social protection

The introduction of **Artificial Intelligence (AI)**, both in the form of machine learning and generative AI, will radically change high-skilled and low-skilled jobs alike. A recent survey suggests that the effect of AI on workers is mixed: on the one hand, most workers believe that AI has increased their performance and enjoyment at the job. On the other hand, most workers fear that AI will result in **job losses**, and some believe that it will result in lower wages[17]. While some studies suggest AI may have a significant positive impact on the **quality of work,** other studies find the use of AI and more generally, ICT driven tools could have a labour-creating effect, as new tasks and jobs include compensating mechanisms, like reviewing and amending decisions performed by AI, as well as training and maintenance of the system.[18] AI inequalities should also be addressed both between countries/regions and within countries. However, it is still an open question for researchers over the quantity of work depending on the balance between substitution potential and the productivity effect of the technology.

Moreover, the COVID-19 pandemic crisis has highlighted the importance of **remote work** assisted by digital technologies. The shift caused geographical boundaries to be blurred as more and more white-collar jobs allow for remote work, and more and more employees value the opportunity to work from home. According to a recent paper[19], in 2023, 28% of paid workdays were from home, four times the estimated share for 2019. This trend is projected to grow as indicated by a high number of office job adverts containing terms related to remote work. Despite the many opportunities, remote jobs pose risks related to working conditions and the offshoring of work to countries with lower labour costs. This phenomenon may be in contradiction to the desire to reshore activities in the face of possible supply chain disruptions due to social and geo-political crises.

The green revolution is recognized as a major source for job creation and will replace or require upskilling of jobs at risk in the manufacturing sector. A survey of major employers[20] shows that a significant source of **job creation** is due to investments that resulted from a broader application of ESG standards and climate-change adaptation. Globally, it is estimated that the green transition could create 30 million jobs in clean energy, efficiency, and low-emissions technologies by 2030.

In face of these structural changes, it is important to highlight that **inequality of wages and jobs** and the exclusion of disadvantaged groups and populations, including women, youth, persons with disabilities, minorities and migrants, are fundamental issues for the future of work. It has been documented that job polarization has increased in Europe, with a steady

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[17] Lane, Williams and Broecke (2023) "The Impact of AI on the Workplace: Main findings from the OECD AI Surveys of Employers and Workers", *OECD Social, Employment and Migration Working Papers* 288, https://www.oecd-ilibrary.org/social-issues-migration-health/the-impact-of-ai-on-the-workplace-main-findings-from-the-oecd-ai-surveys-of-employers-and-workers_ea0a0fe1-en

[18] Hötte K., Somers M., Theodorakopoulos A., Technology and jobs: A systematic literature review, Technological Forecasting and Social Change, Volume 194, 2023, https://doi.org/10.1016/j.techfore.2023.122750.

[19] Barrero, Bloom and Davis (2023) "The Evolution of Work from Home", *Journal of Economic Perspectives*, Vol. 37/4, pp. 23-49, https://doi.org/10.1257/jep.37.4.23.

[20] World Economic Forum (2023) "Future of Jobs Report 2023", https://www.weforum.org/publications/the-future-of-jobs-report-2023/

increase in high-paying jobs and a sharp decrease in mid-paying jobs.[21] The massive increase of women labour force participation has reduced the employment gap of women, but the employment gap of migrants and people with disability remains very large. The effect of the digital and green transitions on inequality remains to be assessed. For example, people with disability may benefit from the opportunities offered by AI to perform tasks but may also suffer from the new forms of sophisticated discrimination policies that AI could enable.

Education & Skills:

The green and digital transition, demographic change and societal shocks pose considerable challenges with respect to how **education and skills provision** can prepare individuals, communities and societies for both short term and long-term changes in employment and careers.

Access to education is mediated by socio-economic background, as the main determinant of education outcomes. However, education is the best protection against unemployment. On average across OECD countries, 61% of 25–34-year-olds with below upper secondary attainment are employed, compared to 79% of those with upper secondary or post-secondary non-tertiary attainment. Workers who lack an upper secondary education earn, on average, 18% less than those who have attained that level.[22]

Furthermore, **educational attainment**, and therefore access to employment, passes down the generations: 30% of adults whose parents do not attain upper secondary education also fail to do so themselves, but only 4% of adults whose parents achieve tertiary education do not attain at least upper secondary education. In nearly every country, the completion rates among students who start a bachelor's programme are lowest for those whose parents did not complete upper secondary education and highest for those with at least one tertiary-educated parent. These inequalities are aggravated by teacher shortages in the majority of OECD countries[23].

Inequities in education are also gendered: **gender imbalances** in various different disciplines perpetuate inequalities, limit opportunities for both genders and narrow perspectives. Only 15% of female new entrants to tertiary education choose to study science, technology, engineering or mathematics (STEM) fields, compared to 41% of male new entrants. Meanwhile, only 4% of male new entrants opt to study in the field of education[24]. Given that the digital and green transition offer many opportunities in STEM-related fields, this suggests many women are likely to miss out on new areas of employment. These inequalities are compounded by intersectional factors such as racial and ethnic background, as well as disability, which can disproportionately affect women by creating additional barriers to entering STEM fields and limiting access to resources, mentorship, and networks. The low number of men in education may also perpetuate the teacher shortage.

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[21] Torrejon Perez, Hurley, Fernandez-Macias, Saffa (2023) "Employment Shifts in Europe from 1997 to 2021: From Job Upgrading to Polarisation", *JRC Working Papers Series on Labour, Education and Technology* 2023/05, https://publications.jrc.ec.europa.eu/repository/handle/JRC132678

[22] OECD (2024), "Equity in education and on the labour market: Main findings from Education at a Glance 2024", *OECD Education Policy Perspectives*, No. 107, OECD Publishing, Paris, https://doi.org/10.1787/b502b9a6-en.

[23] Ibid.

[24] Ibid.

Overall, education systems face significant gaps in addressing inequalities and ensuring equitable access for **disadvantaged groups**. Key challenges include inconsistent implementation of inclusive education policies and persistent barriers such as inadequate resources, regional disparities, and structural biases. Research is needed to analyse these systemic factors and develop concrete recommendations for overall policy reform as well as practical, innovative strategies, such as targeted career development and mentorship programs or adaptable curricula, to create sustainable pathways for underrepresented groups.

While new technologies present great opportunities for people and societies, rapid technological change can also render workforce skill sets redundant and cause labour market displacement.[25] **Learning and skills development** at all stages of life, and in particular sectors is of critical importance. There are considerable talent shortages currently existing in the tech sector, and ways in which this can be addressed includes a skills-first approach to hiring, balanced with a focus on capacity to learn and the promotion of micro-credentials which can be a tool to facilitate rapid skill development, thereby supporting continuous learning and workforce agility. Furthermore, fostering inclusivity in the tech sector is essential, by addressing barriers faced by under-represented groups, including women, minorities, youth and migrants.[26]

Finally, extreme weather and depletion of natural resources are driving the transition to a green economy, but while this will result in job creation in sectors such as renewable energy, there will be job losses in many traditional energy-related industries. This will inevitably lead to considerable changes in skill requirements, both because of the emergence of new occupations and changes in skill needs in existing occupations. **Transversal skills** such as environmental awareness and acting for sustainability will be required across all sectors. Even defining the range of different skills that will be needed to develop green economies is in its early stages, and much research is needed both to identify and implement the right balance of skills development.[27]

Fair Transitions towards climate neutrality:

Achieving climate neutrality hinges not only on technological advancements and policy shifts but also on the active inclusion and empowerment of citizens. Bottom-up approaches that capitalize on community-specific knowledge allow for solutions that are both tailored and impactful. As highlighted by recent studies, these **citizen-driven efforts** are vital for achieving climate goals, particularly in regions where government-led initiatives may be slow or under-resourced.[28]

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[25] International Labour Organization (2020), Skills shortages and labour migration in the field of information and communication technology in Canada, China, Germany and Singapore, https://www.ilo.org/sector/Resources/publications/WCMS_755663/lang--en/index.htm
[26] OECD (2024), Bridging Talent Shortages in Tech: Skills-first Hiring, Micro-credentials and Inclusive Outreach, Getting Skills Right, OECD Publishing, Paris, https://doi.org/10.1787/f35da44f-en .
[27] OECD (2023), Assessing and Anticipating Skills for the Green Transition: Unlocking Talent for a Sustainable Future, Getting Skills Right, OECD Publishing, Paris, https://doi.org/10.1787/28fa0bb5-en .
[28] Papafragkou, A. (2021). *Digital tools and citizen empowerment in environmental policy*. Journal of Environmental Policy & Planning, 23(4), 567-580.

Additionally, to effectively involve citizens in the green transition, digital tools could have a significant positive impact if these are transparent, reliable, and human centred. For example, digital platforms can allow neighbourhoods to monitor air quality or energy usage, empowering them to adopt more sustainable practices at a local level. On the other hand, one should not underestimate the environmental costs that come with the widespread use of AI[29], which tend to be unevenly distributed.

Lastly, the path to citizen inclusion must address socioeconomic barriers. The transition to a green and digital economy can be costly, and low- and middle-income households are especially vulnerable to these changes. **Rising energy costs**, the expense of retrofitting homes for energy efficiency, and transport costs can all place a strain on lower-income citizens, making it harder for them to participate in the green transition.[30]

Those who are often least able to bear the costs of the transition are also among those with the lowest carbon footprints. In Europe, the bottom 50% of the population contributes only a fraction of the emissions compared to the top 10%, who produce significantly higher per capita emissions.[31] Research is needed on the **distributional impact of climate policies** and should investigate how to avoid burdening those who contribute the least to climate change and instead focus on addressing the high emissions of wealthier populations.

Involving citizens directly in climate action helps build trust and public support for broader policy measures. When individuals feel empowered and included in decision-making processes, they are more likely to support ambitious climate policies and contribute to their success. Transparent communication, participatory decision-making, and local-level initiatives can foster a sense of ownership among citizens, creating a more resilient foundation for sustainable change.[32] Citizen Science, a participatory research practice that actively engages societal actors and members of the general public in scientific research and knowledge co-production can play a crucial role here. It allows people to gain a deeper understanding of scientific processes and issues relevant to them and their communities and creates access to actionable data.

Citizen inclusion is not merely an ancillary component of the climate transition but a foundational pillar. Despite an abundance of climate-related data, citizens are often left on the periphery of decision-making processes, with their knowledge and capabilities largely untapped.[33] This gap can undermine public support for climate policies and reduces the potential for grassroots initiatives, which are essential for sustainable change.

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[29] Due to the resources needed for the production, consumption and maintenance of new technologies

[30] European Commission. (2022). *Strategic Foresight Report 2022*. Brussels: European Commission.

[31] Global Inequalities Report. (2022). *World Inequality Lab: Global Report on Income and Wealth Inequality*.

[32] Moser, S. C., & Berzonsky, C. L. (2019). *Climate change and inclusive citizen engagement: Building trust through transparency and local involvement*. Environmental Research Letters, 14(10), 103001.

[33] European Environment Agency. (2020). *The European environment – state and outlook 2020*. Retrieved from EEA.

2.1.2 The role of Social Sciences and Humanities

Europe, with its diversity in institutional settings, welfare state regimes, labour market institutions, and social and political cultures, is a natural suitable laboratory for studying the social transformations European societies are facing and for testing new solutions that could live up to these challenges. A partnership focused on studying these social experiments, deployed at all levels of action (European, national, regional, local) and testing their chances of being transposed to different settings can prove to be an invaluable asset in helping to effectively modernise our social protection systems and education and training institutions. This, in turn, would contribute to protecting and strengthening the resilience of the **European social model**, based on fair working conditions and social dialogue, ensuring a smooth transition to the future of work and laying the groundwork for equal and inclusive societies.

Based on this, researchers from the social sciences and humanities will be tasked with imagining different scenarios, offering policy and foresight analysis, as well as recommendations and ideas for new policy solutions to help EU, national and regional authorities design policies with solid analytical underpinnings and reach the ambitious target committed by the EU and the Member States (e.g. SDGs, Paris agreements, EU Green Deal, European Pillar of Social Rights). Results and outcomes will be presented in a multidimensional and interdisciplinary way, covering economic, employment, social, education, training and lifelong learning and other fair transition related actions and indicators. Distributional impact, behavioural change, impact on opinions and beliefs, and gender differences and other dimensions of inequality should be considered as well.

The strength in seeking interdisciplinary cooperation within the humanities and social sciences[34] (and between the SSH and STEM, where relevant) is of crucial importance in order to comprehensively understand and analyse social transformations and their implications for social cohesion and social resilience.

Within this Partnership, the **social and behavioural sciences** will be mobilised to produce empirical data and theoretical frameworks for complex social phenomena. They will also provide qualitative and quantitative analyses, which examine social structures, behavioural patterns and institutional dynamics, and provide insights into social inequalities, power relations and the impact of political decisions on people's lives. The humanities, such as philosophy, literary studies and history, will offer deeper insights into the cultural, ethical and historical contexts that shape these behaviours and social structures, and help us understand underlying values, beliefs and narratives that influence individuals and collective consciousness. Combining quantitative and qualitative methods of data collection and analyses, as well as participatory and action-oriented approaches, hermeneutic approaches and critical theories will make it possible to grasp complex phenomena and arrive at a deeper understanding and novel solutions.

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[34] A broad listing of the fields within the arts and humanities and social sciences is given here: Social Sciences and Humanities (SSH) - H2020 Online Manual. This listing is cited here to give an orientation and not meant to be comprehensive: The range of disciplines evolving within the two fields is not identical across the partners.

With a view to develop a coherent body of evidence and policy solutions, the Partnership will insist on inviting these disciplines to truly work together – from the research design to the integration of results into a coherent narrative – rather than to juxtapose their isolated contributions. In this sense, the Partnership shall encourage true **interdisciplinarity and trans-disciplinarity,**[35] also encouraging contributions and expertise from outside academia.

Activities will develop innovative solutions to societal challenges and support collaboration between policymakers, social partners, civil society, social entrepreneurs and the R&I community for their successful implementation.

2.2 Common vision, objectives and expected impacts

2.2.1 Common Vision: general, specific and operational objectives

The Social Transformations and Resilience Partnership will create a 7–10-year Research and Innovation programme with the social sciences and humanities to explore and make use of their potential to build resilience, ensure fairness and inclusiveness, and foster social cohesion in the light of changes in climate and environment, technology, demography, and unexpected shocks.

Innovations and scientific results achieved will contribute to reaching EU priorities on the European Pillar of Social Rights, the EU Green Deal, and strengthening the European Research Area (ERA), the European Education Area (EEA) and will contribute to designing better national, regional and local policies in line with their respective strategies.

They will also contribute to the implementation of SDGs 1 (No Poverty), 4 (Quality Education), 5 (Gender Equality), 8 (Decent Work and Economic Growth), 10 (Reducing Inequalities), 11 (Sustainable Cities and Communities), 13 (Climate Action), and 16 (Peace, Justice and Strong Institutions).

In response to social transformations resulting from the green, digital and demographic transition, as well as unexpected shocks, the overarching **general objectives** of the partnership is to generate evidence-based knowledge, tools and innovative solutions to contribute to:

- Building **resilience** in societies
- Ensuring **fairness and inclusiveness**
- Fostering **cohesion in societies**

To achieve these general objectives and thereby strengthen the democratic fabric of European societies, the Partnership will provide a multi-disciplinary scientific evidence base for

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[35] Literature reveals a heterogenous and contested understanding of these terms, yet some common patterns can be identified, where interdisciplinary research is often referred to as involving two or more disciplines, whereas transdisciplinary research refers to integrating knowledge across academic disciplines and collaborating with non-academic stakeholders in the process of knowledge production. See also the Horizon 2020 funded SHAPE-ID project: https://www.shapeidtoolkit.eu/

European, national, regional and local policymaking in four **impact areas ('specific objectives'):**

1. Supporting the modernisation of social protection systems and essential services
2. Shaping the future of work
3. Fostering education and skills development
4. Contributing to a fair transition to climate neutrality.

Each of these impact areas will be outlined in more detail in the following sections (2.2.2. - 2.2.5). They have been co-created by the drafting group, as well as through participatory meetings, which took place online on 29 May and 02 July 2024, with a wide range of stakeholders from academia, research funding bodies, ministries, civil society organisations, social partners, social entrepreneurs and R&I networks. While the gaps and research themes identified in this co-creation process intend to provide a first overview and direction for the partnership, eight independent experts, funded under the Horizon Europe Cluster 2 Work Programme 2024, will complement this with a more rigorous **state-of-play analysis** for each impact area, which will inform the development of the Strategic Research and Innovation Agenda (SRIA) of the partnership. This state of play analysis will be available in the first quarter of 2025. To support the preparation of its Strategic Research and Innovation Agenda (SRIA), independent experts will be contracted to conduct a more rigorous state-of-play analysis of emerging questions in each of the four impact areas.

Moreover, to support the implementation of these specific objectives, the partnership will develop and launch activities along six **operational objectives**, which are outlined in more detail in chapter 3 and include:

1) data collection,
2) comparative studies,
3) social experimentation,
4) connecting researchers with policymakers, citizens and stakeholders,
5) developing new analytical, methodological and epistemological tools, and
6) supporting capacity building among the R&I community and policymakers.

2.2.2 Impact area 1: Social protection and essential services

Social protection systems and essential services[36] are different but interacting sides of the welfare state. The 'cash' side of the welfare state resources, such as social insurances and income transfers, are intended to address the risk of income loss and poverty due to unemployment, sickness or old age reducing market incomes, while the 'care side', i.e. services which are subsidized or provided free of charge at the point of use, are intended to handle collective needs related to childcare, education, health and long term care and social support. When the societal context and the drivers of different risks and needs are changing, welfare

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[36] Though there is an EU definition for common standards about services of general interest (art. 14 of the TFEU), there is not a common agreed definition for social services or essential services. However, in this context we consider education, health, care, and social housing to be essential services.

state programs and services need to adapt. This adaption is one of the expected impact areas of the Social Transformations and Resilience Partnership.

While societies are always in transition, the current system of social protection and essential services finds itself under pressure due to the convergence of key megatrends such as the green transition, digitalisation, and demographic shifts. The transition towards climate neutrality will reshape labour markets, prompting the need for income security and training. Furthermore, digital transformations challenge the traditional employer-employee relationship with repercussions for access to, as well as funding and delivery of social protection and essential services. The digital transition is also having major impacts on social security by reinforcing inequalities and problems of accessibility.

Lastly, an ageing society means fewer contributors and a surge in the demand for services such as old age assistance. Other demographic changes such as low fertility rates, migration flows within the EU and from outside of the EU, and an imbalance in the demands and opportunities for different age groups, pose complex social policy questions on social cohesion and inequality.

Gaps and needs for future research

Research in this field has predominantly focused on dissecting welfare regimes or evaluating the efficiency of specific social and employment policies. However, there's a growing recognition of the need for more integrated and dynamic research approaches, as well as a focus on problem solving. By bridging disparate themes and drawing from diverse SSH disciplines, future research can better capture the interaction between social protection frameworks and how new socio-economic realities may be handled to better match the material and social needs of the population.

Social protection and essential services systems need to be sustainable, adaptable, and capable of fulfilling their purpose and handle both long-term challenges and occasional shocks. The integration of green transition into the delivery of essential services (for example ageing and rural population) needs also to be accounted for, together with the environmental impact of social services.

To achieve this renewed vision for social protection and essential services, there is a need for a more integrated understanding of how social policy can be used to increase resilience and reduce inequalities in people's wellbeing. Important gaps remain in how to ensure inclusiveness and accessible social protection and essential services systems.

The need for new research regarding social protection and essential services range from the system level to specific issues regarding design. This includes the intersection between social protection and essential services and the **new drivers of inequalities and poverty** that emerge in the wake of social transformations that affect people's labour market attainment, income and living conditions.

Other issues such as access to housing, energy, as well as access to public transport have become dominant issues in the explanation of new inequalities and segregations. Further research is needed on the link between transport poverty and other dimensions of inequality such as access to social services, school, healthcare. Similarly, attention should be dedicated

to the forms of access and to the cost of housing and how these can lead to forms of expulsion from the best-served areas (also in terms of work opportunities).

In order to contribute to new solutions there is a need for both reappraisal and reviews of established principles, such as the concept of "universality" or "insurance". It is important that research identifies transformative paths in **welfare state development** that are better able to respond to multiple challenges at the same time, but also important to identify possibilities to implement solutions from one type of welfare state into another.

Furthermore, the **stability and effectiveness of the social security and social assistance systems** as well the sustainability of the financing and taxation models remain issues of great importance. With diminishing revenues and challenges to tax revenue from industries shifting to other parts of the world and increased demand questions of resources to deliver good quality services are paramount. In this context, distributional effects of current and new social benefits designs need to be assessed. Furthermore, there is also a need to review the interstate competition in financing social protection and essential services and the effect this has on financial sustainability. An important line of research could be the verification/analysis of emerging new forms of public-private-third sector partnerships in the provision of services, not only in the form of delegation, contracting out, competition, insurance, but of shared work/effort.

All the challenges in societies and across countries have also led to answers coming from citizens, innovators and entrepreneurs to design and provide services, which compensate gaps in the welfare systems. These social innovations often lack diffusion into the welfare system and thus stay with limited impacts. Also, the networking of actors in the social innovations system comes up short.

Finally, more attention needs to be paid to **changing norms** in the delivery of welfare and the realignment of the public regarding which social problems need to be addressed, by which policy, and at what level of society. In this regard, the digitalisation of the social and essential services, the digital and AI assisted delivery of social protection, and its consequences need to be investigated not only from a financial point of view but also one of societal expectations and norms and existing digital divides. Research should pay attention to new forms of potential discrimination that may emerge as welfare providers adopt new technological tools in the assessment of requests for social protection and services.

2.2.3. Impact area 2: Future of Work

The Future of Work represents a projection of how workplaces, occupations and tasks and skills requirements will evolve in the years ahead influenced by technological, socio-economic, political, environmental and demographic changes.[37]

The European labour markets are undergoing a significant transformation due to key megatrends such as the green transition, digitalisation, and demographic shifts. The transition

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[37] Lynn, Theo, et al. "The Future of Work: Challenges and Prospects for Organisations, Jobs and Workers." (2023): 167.

towards climate neutrality is altering demand on (green) skills, job distribution and access. Meanwhile, the integration of digital technologies, artificial intelligence and human-machine collaboration is reshaping workplaces, impacting skill requirements and raising concerns about mental health, worker autonomy, and privacy, among others. Additionally, an aging workforce as well as shifting values attributed to the role of work are prompting a reconsideration of work cycles and social and migration policies. Lastly, climate change already has a direct consequence on working conditions (heat, UV radiation, extreme weather emergency situations) and further challenges (vector-borne diseases or allergies) are to be expected which need tailored approaches to ensure healthy and safe workplaces.

These changes impact European societies at various levels, affecting employers, workers, social and labour infrastructure, and they impact social cohesion and widen social inequalities. The future of work necessitates simultaneous adaptation by businesses, industry, workers, and governmental institutions, as traditional models evolve, societal aspirations change, and new demands for government services emerge. New skills for the present and the future generations need to be anticipated; technology will need to be human-centred; re-skilling and upskilling for the green and digital sectors necessitate new educational directions at all levels. All segments of society – workers, their families, businesses and state institutions, must not only adapt to these changes, but also become agents of the transition to a more inclusive, more equal, fairer, society.

The study of the future of work has evolved over several decades, reflecting the dynamic shifts in the labour landscape. Previous research generated fundamental insight into employment dynamics, particularly concerning organizational restructuring and its impact on workers, including the need for re-skilling and up-skilling. With the advent of digital technologies, novel organizational structures and human resource management took centre stage and research deepened societal understanding of how technology impacts wage inequality, job satisfaction, workers in vulnerable situations, and worker wellbeing.

Gaps and themes for future research

Though the subject has been intensely studied, emerging questions in the field highlight the need to better coordinate R&I investment.[38] The triple green, digital and demographic transition raises questions regarding work organisation and business models; work quality and wellbeing; access to work; inequalities, social policies and cohesion. Regarding the re-organisation of work, the transition raises new questions over unequal business digitalisation and climate adaptation, and the impact of new technologies, including Artificial Intelligence, over firm organisation, leadership and work cultures. The role and history of management, trade unions and **collective bargaining** as agents of change requires further investigation. The rising demand for care work induces new models of work organisation, with a differential effect according to gender and age differences.

Similarly, and synergistically, the triple transition has a substantial impact on **work quality and wellbeing.** There are currently knowledge gaps regarding the interaction between people, machines and intelligent systems, the impact of new technologies on mental health, the effect of work quality on workers and their families and the ability of workers to cope with and shape

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[38] European Commission (2023), [Towards an EU research and innovation agenda for the future of work](#)

the transitions. How to strengthen the agency of workers as drivers of transitions and reinforce the participation of workers in decision making at work is an important challenge. Improving wellbeing at work may also involve rethinking work beyond productivism and growth and tailoring work conditions to workers according to their age.

The triple transition drastically reshapes the economy with a significant impact on **job access.** Important questions emerge on how a future, human- and climate-centred transition can foster participation and inclusion and ensure how different social groups especially disadvantaged groups as well as different age groups, can participate in the transition, how skills and competencies needs are evolving, how institutions and public policies can improve the **functioning of labour markets**. Increasing the participation of women in both green and digital sectors is also a key challenge. Policies, businesses, and public opinion need to further reflect how migration questions can be combined with those on demographic challenges. Lastly, the changes brought by the transitions are impacting **social cohesion and existing inequalities** raising concerns on how to ensure adequate support and social security and how the transition affects existing and emerging inequalities in work, education, access and resources. These inequalities must be analysed across gender, across different social groups, across geographic regions. Particular attention must be drawn to the rural/city divide, to the welfare of disadvantaged and migrant groups and their access to jobs. The role of digital tools to support the inclusion of disadvantaged groups, as well as their risk of creating biases and widening inequalities, must be emphasized. The relation workplace and democracy needs to be contextualised, as well.

The Social Transformation and Resilience Partnership aims to cover some of the research gaps which have been identified above. To support the preparation of its Strategic Research and Innovation Agenda (SRIA), two independent experts will be contracted to conduct a more rigorous state-of-play analysis of emerging questions in the area of the future of work.

2.2.3   Impact area 3: Education and Skills

The scope of this specific objective is structured along the drivers of social transformations, which are central to the STR Partnership: the green and digital transition, demographic change and unexpected shocks. Also central to this scope are the overarching themes of formal and informal learning: fostering education and skills development requires a holistic approach, from early childhood education, towards vocational education and training (VET), higher education, work-based learning, and lifelong learning for all. In particular, with the ongoing and impending job destruction in certain areas and job creation in others[39], research and innovation into lifelong learning models, paired with active policy measures for skills development are essential. Supporting disadvantaged groups, including persons with low-income background, refugees and migrants, persons with disability, and young people with difficulties in staying in education or entering the labour market (e.g. NEET[40]) as well as ageing

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[39] Cedefop (2023). *Skills in transition: the way to 2035*. Luxembourg: Publications Office. http://data.europa.eu/doi/10.2801/438491

[40] NEET: Young people neither in employment nor in education and training

and rural population, with tailored skills acquisition and recognition of educational qualifications, including micro-credentials, will be particularly important in this regard

Gaps and themes for future research

The green and digital transition are predicted to contribute to an increase in global employment by 2030 on the one hand and have led to labour and skills shortages on the other hand[41], amplified by other megatrends like demographic change. While several studies have analysed the persistent underrepresentation of women in STEM and ICT[42], as well as the proportion of early school leavers across certain demographic groups, further research is needed on the structural changes that are required within education and training systems to ensure women, youth and disadvantaged groups can seize the opportunities of the predicted jobs growth.

Moreover, while many initiatives, including those funded under the Horizon Europe and Erasmus+ programme, tend to focus on developing innovative teaching approaches and new training curricula, the effectiveness of such initiatives and their long-term impact on learning and employment outcomes, social mobility, and environmental sustainability are less well known. Such assessments could be complemented by research focusing on changing skill demand and anticipating future skill needs to align education and training systems at various levels with rapidly changing labour market demands as well as to contribute to the development of advanced education and career guidance programmes and **vocational training**. Finally, although many of the skills associated with the green and digital transition are STEM related, research shows that soft skills, related to arts and humanities concepts, such as creativity and critical thinking, are equally important to adjust to socio-economic transformations and develop resilience to deal with increasing uncertainties, arising from unexpected shocks, like the COVID-19 pandemic and geopolitical conflicts, but also the spread of disinformation and eroding trust in political and scientific institutions.[43] In this regard, the impact area on education and skills is closely interlinked with the impact area on a fair transition towards climate neutrality, which also aims to explore issues of building trust and legitimacy.

Given the wealth of research and initiatives which are already ongoing in the area of education and skills development, the role of the **STR Partnership will focus on coordinating and facilitating synergies** in this area (e.g. supporting uptake of research results, connecting stakeholders), and complementing with additional research insights, where needed. As for the other impact areas, the Commission will contract two independent experts to conduct a state-of-play analysis of research gaps and trends on education and skills, which will support the preparation of its Strategic Research and Innovation Agenda (SRIA) next year.

Further themes for possible future research and innovation activities, which the Partnership could address under this impact area, are outlined below.

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[41] Employment and Social Developments in Europe (ESDE) 2023, https://op.europa.eu/webpub/empl/esde-2023/chapters/chapter-2-3-1.html

[42] European Commission, Directorate-General for Research and Innovation, She figures 2021 – Gender in research and innovation – Statistics and indicators, Publications Office, 2021, https://data.europa.eu/doi/10.2777/06090

[43] European Commission, Directorate-General for Research and Innovation, Dixson-Declève, S., Renda, A., Schwaag Serger, S. (2023). *Transformational education in poly-crisis*, Publications Office of the European Union. https://data.europa.eu/doi/10.2777/98947

Green and digital transition:

- Development of STEM and ICT skills, literacy; and more broadly capital[44], particularly for women and disadvantaged groups, as well as more transversal soft skills (e.g. problem-solving, communication, creativity).
- Develop skills intelligence and anticipation tools to address evolving labour market needs at sectoral and regional level.
- Examine the effectiveness of education systems, including vocational education and training (VET), and their relevance and meaning from a multi-generational perspective to gain a better understanding on how to adapt these systems in a rapidly changing socio-economic and cultural reality.
- Advance knowledge and skills of environmental sustainability to empower children and adults to engage in collaborative efforts to become 'sustainability natives.'
- Examine the potential and innovation of digital education systems to bridge skills gaps, foster inclusive lifelong learning, and deliver tailored and adaptive educational solutions.

Demographic change:

- Analyse labour and skills shortages and horizontal segregation, especially in sectors which are strongly affected by the ageing populations, and support citizens to upskill and reskill at all stages in life.
- Investigate multilingualism and other competencies (e.g. intercultural awareness) needed for service providers to deal with increasingly diverse societies.
- Effects of demographic change on education and training systems, including potential consequences on school segregation, and increasing inequalities.
- Explore theoretical understandings, policies and initiatives to promote the 'right to training', especially for persons in precarious situations (e.g. persons with disabilities, long-term unemployed), to meet adult learning targets and ensure their employability across entire working lives.

Resilience to unexpected shocks:

- Fostering entrepreneurial and transversal skills for all, e.g., systems thinking, creativity, fusion of arts-making and scientific-based experimentation.
- Strengthen critical thinking and information literacy for knowledge acquisition among children and adults and examine the role of teachers and educators in strengthening resilience to disinformation.
- Promote research on education for citizenship and democratic values to foster social cohesion, as well as research on education and skills for crisis behaviour and management at individual and organisational level.

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[44] STEM capital implies a psychological comfort with STEM topics; STEM literacy implies a reasonable knowledge of STEM; while STEM skills relate more obviously to working in specific STEM areas.

- Enhance public-private collaboration, including by incentivising and enabling enterprises to utilise workers' skills through innovative workplace solutions.[45]
- Investigate the role of decentralized and digital education systems to ensure robust learning continuity during disruptions like pandemics or natural disasters.

2.2.4 Impact area 4: Fair Transition to Climate Neutrality

Fairness and inclusiveness are an integral part of the European Green Deal, which underlined that no person and no place should be left behind in the transition towards a climate neutral economy and society. In particular, the Council Recommendation on a fair transition towards climate neutrality[46] provides guidance to Member States on how to best address the social and labour aspects of the green transition. The rapidity and scale of transition requires major adjustments to many people's employment, lifestyle, and attitudes, including potential loss of income, job-to-job transitions, and disruptions to habits and cultural practices, which can be met with further societal resistance. The distributional impacts of climate mitigation and adaption policies further complicate the challenge, as vulnerable communities, such as low-income households, seniors, and persons with disabilities, are disproportionately affected, magnifying the urgency for ensuring equitable impacts across sectors, regions, and demographics. If not addressed properly, social conflicts may aggravate in the course towards decarbonisation, or as a direct result of climate change, risking a breakdown of social cohesion. Sustainable, lasting change requires citizen to be actively involved in policy processes on the green transition, which necessitates the co-production of common ethical values and trust in science, as well as trust in the legitimacy of political institutions and democratic decision-making. Social innovation can be one tool for enhancing citizen engagement and co-creation of solutions in this regard.

The Social Transformations and Resilience Partnership will contribute to this by clarifying challenges, supporting citizens' trust in democratic decision-making, developing human-centred tangible solutions, and providing knowledge and tools that can be used to develop and evaluate policies and strategies for achieving the 2050 climate targets.

Gaps and themes for future research:

Efforts to understand the social dynamics of the green transition and its distributional impacts have intensified in the recent past, informed by the European Green Deal's objectives. Studies highlight the need for an economy that prioritises social well-being, equitable policy impacts, and trust in governance and science.[47] Further investments in citizen engagement initiatives, policy dialogues, and interdisciplinary research are needed to yield insights into systemic challenges and opportunities. Accordingly, future research should focus on democratic tools to

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[45] OECD (2023), OECD Skills Strategy Ireland: Assessment and Recommendations, OECD Skills Studies, OECD Publishing, Paris, https://doi.org/10.1787/d7b8b40b-en.

[46] Council Recommendation of 16 June 2022 on ensuring a fair transition towards climate neutrality 2022/C 243/04

[47] Matti, C. Jensen, K., Bontoux, L., Goran, P., Pistocchi, A. and Salvi, M, Towards a fair and sustainable Europe 2050: Social and economic choices in sustainability transitions, Publications Office of the European Union, Luxembourg, 2023.

engage society in green transformation processes. In this context, examples from past social movements and transformative processes could be examined to draw conclusions on the transformative potential of contemporary European societies. The topic of the social conditioning of industrial policy in times when industrial policy is gaining increasing importance for the transformation of the economy also deserves attention.

Moreover, knowledge and data on the medium- and long-term socioeconomic effects of climate policies and instruments, including their distributional impact, is lacking. In this context, quantitative-qualitative foresight approaches could help provide further insights into the socioeconomic impact of the green transition in different trajectories.[48] Further research is also needed to understand how available data could be 'translated' to become accessible and meaningful to citizens and policymakers alike, and thereby help inspire behavioural change and inclusive transition strategies. Possible future research themes, which the Partnership could address under this impact area, include:

1. **Conceptualising fairness:** Investigate changing perspectives on fairness, considering economic, political, cultural, philosophical, geographical and historical dimensions, to inform equitable policy frameworks and tools.
2. **Attitudes, values and lifestyles:** Examine how behavioural patterns, routines and cultural practices of social actors (e.g., individuals and organisations), can change and adapt to become positive drivers for environmental and climate sustainability and social reform.
3. **Building trust and legitimacy:** Explore mechanisms to enhance climate action, citizen participation, communication, and trust in green policies and democratic processes, essential for effective design, implementation and uptake of innovative solutions.
4. **Climate policy instruments and frameworks:** Investigate and evaluate the efficacy of economic instruments for climate change mitigation (e.g., CO_2 pricing), and their impact on society. Analyse structural inequalities and the distributional impacts of climate policies on vulnerable communities, based on intersecting factors like race, gender, income, and geography, ensuring inclusivity in transition strategies.
5. **Systemic design approaches:** Examine the efficacy of systemic design approaches in addressing green transition challenges and explore how SSH and social innovation can be integrated in industrial and organisational domains for human-centred design, products and services.
6. **Democratization of the green transition:** Investigate (e-)participation and democratisation mechanisms in climate governance, fostering inclusive decision-making and enhancing social cohesion, while considering participatory challenges of vulnerable communities. Examine the role of and challenges for social dialogue, which is needed to give social partners ownership over the green transition.
7. **Green-digital nexus:** Explore the synergies and tensions between green and digital transitions, identifying opportunities for integrated strategies that promote fairness and sustainability.

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[48] Eurofound and EEA, The transition to a climate-neutral economy: Exploring the socioeconomic impacts, Publications Office of the European Union, Luxembourg, 2023.

2.2.5   Links and collaboration opportunities

This Partnership takes a systemic approach and focuses on the social dimensions of the green, digital and demographic transitions, and unexpected shocks. Research and innovation actions, as well as additional activities, will be based on needs and challenges in the **four impact areas** described in the previous sections. However, changing labour markets, social infrastructures and public services in focus of this Partnership are components of a larger context, and the **systems perspective** needs to be reflected and dealt with in several ways. It will be regarded in the design of the activities of the Partnership, but it also calls for potential collaboration and interaction with other relevant ongoing Partnerships and initiatives. This interaction is meant in both ways: the STR Partnership can strengthen the social dimension that might be lacking or less developed in other initiatives while these other initiatives can in turn broaden the perspectives developed in STR. Social, economic and cultural considerations need to be part of research focus and policy actions if we want transitions to be affected in an effective, sustainable, and fair manner. Innovative solutions and policy measures, responding to green and digital challenges, need to take society on board, among others through co-creation efforts, citizen science and social innovation, to ensure uptake of the developed solutions.

The need for a systemic and holistic approach means in particular that the knowledge base that this Partnership will generate is grounded in **interdisciplinary and transdisciplinary research**. The collaborations between scientific disciplines and with non-academic expertise enables to triangulate topics of study and thereby generate useful knowledge for society and policy. Collaboration between social sciences and humanities (and with STEM when appropriate) are paramount in this partnership. The Driving Urban Transitions (DUT) Partnership will be an example of a successful development of inter- trans disciplinarity and transformative co-creative mechanisms in the case of urban settings. We envisage to learn from DUT and other Partnerships and create synergies, where appropriate.

In consequence, apart from making use of existing collaborative networks and existing bodies of knowledge, the Partnership foresees two main strands for potential future interaction, joint activities and creation of synergies to increase its impact: **Collaboration with other Partnership initiatives already focusing on SSH** uptake or co-creation methodology with civil and policy stakeholders on the one hand (such as DUT, Climate KIC, TCHS, Brain Health, for ex.) and demonstrating the potential of a focus on social aspects and a transdisciplinary approach to the **technology-oriented Partnerships** on the other (Clean Energy Transition (CET) Partnership, as one example of the numerous Partnerships focusing on technology). The 2024 Biennial Monitoring Report on Partnerships in Horizon Europe supports STR's future planning with a good indication of the EU policy priorities of the existing Partnerships landscape.[49]

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[49] European Commission: Directorate-General for Research and Innovation, *Performance of European partnerships – Biennial monitoring report 2024 on partnerships in Horizon Europe*, Publications Office of the European Union, 2024, and its *Technical addendum*, Publications Office of the European Union, 2024, **https://data.europa.eu/doi/10.2777/826135**, **https://data.europa.eu/doi/10.2777/991766**)

The main actions we foresee are: Strategic exchange; knowledge exchange; communication; dissemination of project results; networking between funders as well as project partners; aligning national research agendas; capacity building; joint calls. All these activities will need to be developed, prioritized, regularly updated and subdued to STR's future fitness checks.

In the preparatory phase, meetings with the EIT Climate KIC and the two European Partnerships DUT and CET already specified a substantial need for social sciences and humanities research in the technology-oriented fields and potential for strategic collaboration in stakeholder and policy dialogues with the DUT Partnership.

To complement the existing **ecosystem of European Partnerships**, STR will define its place within the more than 50 Partnerships, Missions[50], and EIT KICs. The selection of concrete collaborators and a portfolio of forms of links to other actors will be developed along the way during the duration of the Partnership and be part of the strategic dialogue in the governance of the Partnership. Representatives from these Partnerships, Missions, other European and international networks will be engaged through the **STR Synergies Forum** (see 3.3. Governance), which creates a space for knowledge exchange, mutual learning and co-creation.

STR also acknowledges its position in the ecosystem of the research and innovation funded via **Horizon Europe** through its three Pillars. The Partnership originates in Cluster 2 'Culture Creativity and Inclusive Society' of Horizon Europe, more specifically in the Destination on Social and Economic Transformations but with very strong links to the thematic range of the Destination Democracy and Governance and further linkage to the Destination European Cultural Heritage and the Cultural and Creative Industries (with an upcoming Partnership on Resilient Cultural Heritage). As such, the STR Partnership stands on the shoulders of a vast knowledge base of EU funded projects and projects funded by several previous ERA-NETs and Joint Programming Initiatives in its fields and has a range of dedicated research infrastructures at its disposal as well as science and knowledge activities of the Joint Research Centre (JRC). However, synergies will also be sought with the projects from the other thematic clusters of Horizon Europe.

Synergies to be explored outside of the Horizon Europe Research and Innovation Programme are the European Structural Funds, such as the **European Social Fund**+ (mainstreaming and upscaling of R&I solutions to foster social integration of people at risk of poverty and social exclusion; promoting human capital development in R&I through up/reskilling the make the ERA fit for the green and digital transition) and **ERASMUS** + (using new or relevant research results to inform teaching and education policies).

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[50] EU Missions in Horizon Europe aim to bring concrete results by 2030 to major social challenges, by mobilising public and private actors and operating through a portfolio of actions, such as research projects and policy measures. Currently there are five EU Missions: Adaptation to Climate Change; Cancer: working with Europe's Beating Cancer Plan; Restore our Oceans and Waters by 2030; 100 Climate-Neutral and Smart Cities by 2030; a Soil Deal for Europe: https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe_en

The following graph shows the potential links and collaboration opportunities which the STR Partnership aims to explore. It represents a non-exhaustive map of the ecosystem of relevant European Partnerships, missions, and Horizon initiatives, which can be expanded in the future.
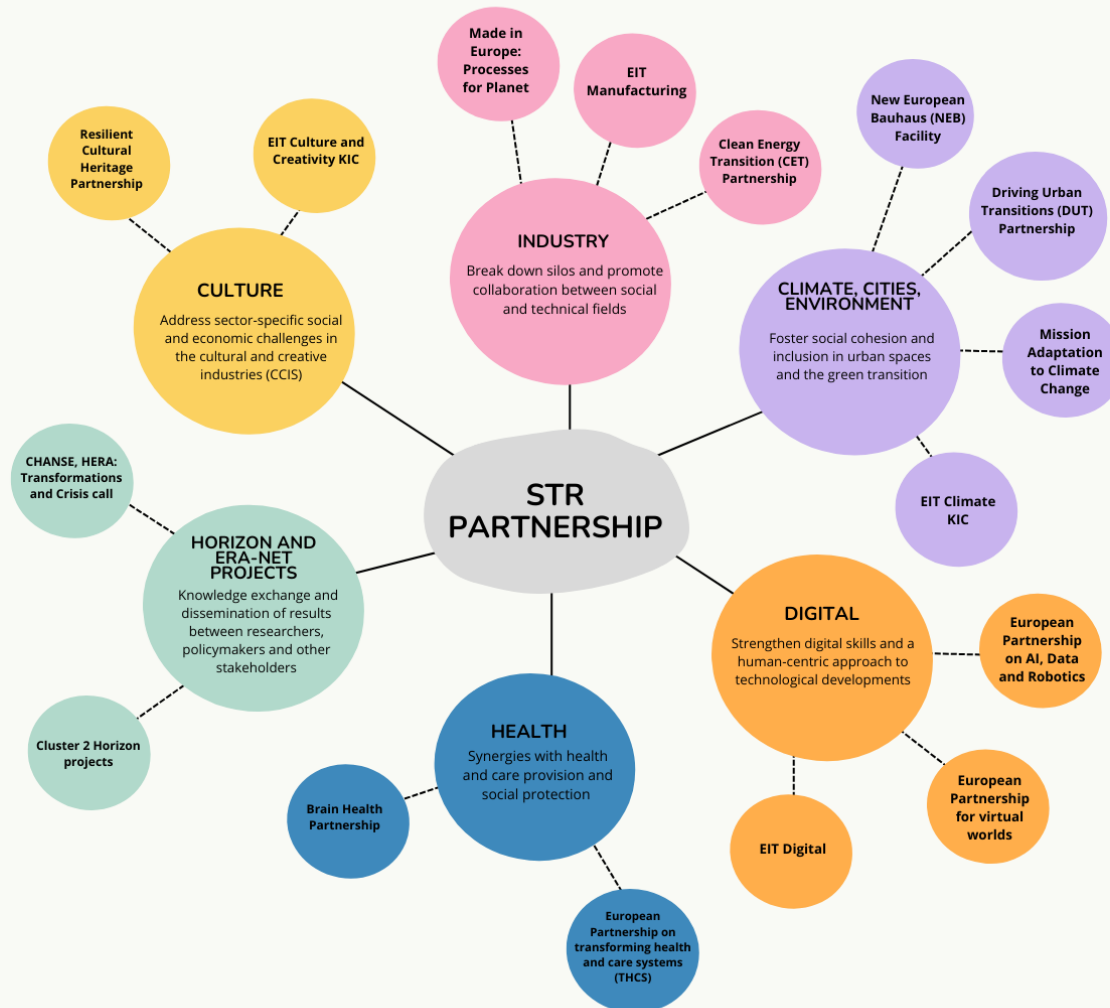
Figure 1: Map of potential links and collaboration opportunities

2.2.6   Transition strategy

The Social Transformations and Resilience Partnership builds on the work of a number of precursor networks and initiatives, including HERA and NORFACE, the Trans-Atlantic Platform for Social Sciences and Humanities (T-AP), the Joint Programming Initiative More Years, Better Lives (JPI MYBL), as well as the ERA-NET co-fund CHANSE, which was developed through collaboration of some these different initiatives.

The table below indicates the duration of ongoing initiatives and R&I Framework Programmes with the formal end date (dark colour), and their estimated continuation beyond this date (light colour). The STR Partnership aims to be launched with the Cluster 2 Work Programme 2026 of Horizon Europe and continue for at least seven years into the next Framework Programme for Research and Innovation (FP10), with the possibility to administer the last calls and wrap-up final activities until 2035. The CHANSE[51] ERA-NET will end in 2026 and is already investing its time and expertise to the development of the STR Partnership. On the other hand, HERA and NORFACE, will maintain their network, but are also developing new activities, including financial and scientific commitment to the development of the STR Partnership. We see therefore an overlapping but not a cessation of ERA-NETs and partnerships, evolving over time, without necessarily losing the institutional knowledge built up in each instrument, but rather passing it along.

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
CHANSE													
HERA													
NORFACE													
Horizon Europe													
FP10													
STR Partnership													

Phasing out strategies are a mandatory component of a European partnership's strategy because they must aim at becoming sustainable, when the EU contribution has ended, but the term **transition strategy** is a more positive one. Transition implies developing more synergies; next steps will depend on the links with other instruments. The Social Transformations and Resilience Partnership will take its cue from its precursors, the HERA and NORFACE networks, the CHANSE ERA-Net Co-fund and others, and will aim to build long term and evolving alliances through the consortia, developing additional activities to increase the partnership's political importance.

As part of the partnership's governance model, it is proposed to include an annual **'Future Fitness check' (FFC)** (see chapter 3.3.e)**.** The FFC is the key for adapting the governance structure to new circumstances and aims at incorporating learnings. Throughout the duration of the STR Partnership it will evaluate the past year and will suggest improvements, involving

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[51] https://chanse.org/

members of the various management and advisory boards, as well as external and national members. The partnership will also have to take account of the different priorities and structures that may emerge under the next EU Framework Programme for Research and Innovation (FP10). In general, therefore the FFC will oversee activities at all levels, paying close attention to what is effective, what is not, and what new insights emerge through the work that require structural support, and of the evolving framework context. It will also incorporate a purposeful post EU- funding focus, looking at where the partnership can usefully continue to contribute and develop as it phases out of the EU framework, leveraging the networks it has created. The future fitness check will therefore build into the governance design an intentionality in the annual planning of the partnership to orientate activities towards a post-framework funding phase, from an early stage.

2.3   Necessity for a European Partnership

The nature and magnitude of the social transformations that Europe is undergoing coupled with the heterogeneity in policies and institutional settings across Member State call for knowledge and resources sharing, and long-term, concerted actions, based on a joint strategy and vision, from research funding organizations and national authorities in research, education, employment and social affairs.

The European Union has been a global leader in promoting and adapting to green and digital through various partnerships, missions, and programs. Despite the broad objectives of the **European Green Deal** which emphasize the need for inclusive and equitable transitions, most funded projects are heavily skewed toward technological, environmental, or economic solutions. Social aspects, such as behavioural change, cultural adaptation, social inequality, and governance models that consider social implications, remain underrepresented. There remains a critical gap in initiatives focused explicitly on addressing the social dimensions of these transitions, a perspective which the social sciences and humanities are well equipped to deliver.

Various European Commission communications and independent reports have highlighted the importance of SSH integration in addressing social implications of transitions.[52] The Commission has acknowledged in *Horizon Europe Work Programme 2021-2022* that SSH insights are fundamental to understanding and guiding social adaptation to policy goals, yet there is a shortfall in practice when it comes to strategic, long-term funding instruments, like European Partnerships.

The current funding landscape highlights a distinct lack of dedicated, co-funded or co-programmed European Partnerships, Missions, or Knowledge and Innovation Communities (KICs) that fully leverage SSH knowledge, methods and models to tackle social challenges resulting from the green, digital and demographic transition. Horizon Europe has launched

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[52] European Commission: Directorate-General for Research and Innovation, Integration of social sciences and humanities in Horizon 2020 – Participants, budgets and disciplines 2014 - 2020 – Final monitoring report, Publications Office of the European Union, 2023, https://data.europa.eu/doi/10.2777/075642

several partnerships in areas such as health, climate, and energy. However, the social science and humanities perspective into these partnerships is often limited to supplementary roles rather than primary investigative or policy-forming functions. While it is not the aim of the STR Partnership to substitute efforts or obligations for SSH integration of existing partnerships, Missions or Horizon Clusters, it can nevertheless strengthen the production, dissemination and uptake of SSH results among relevant stakeholders and policymakers, for example through joint calls and activities with these initiatives. In particular, the **involvement of national stakeholders**, like public authorities, social partners, and civil society organisations, in the process of programming, implementation and **uptake of results** stands a stronger chance to be more effective at national and regional levels than individual Horizon Europe projects, funded under regular Work Programme topics. Concerted, long-term research and innovation actions in areas like employment, education, social protection and fair transitions, also help us make policies more effective, and ensure a more efficient use of funds.

The STR partnership will allow for the necessary long-term coordination of funding strategies, including by developing a Strategic Research and Innovation Agenda (SRIA) and help avoid unnecessary duplication of research and innovation efforts. It should thereby foster European cooperation and break down fragmentation in the SSH field, strengthening the European Research Area and promoting **widening participation** in this regard.

The STR partnership under Horizon Europe's Cluster 2 '*Culture, Creativity and Inclusive Societies',* which emphasises social transformations and resilience, particularly from the SSH perspective, will significantly enhance policy priorities on the European Pillar of Social Rights and Green Deal by addressing the challenges outlined in chapter 2.1.1.

An explicit co-funded European Partnership aimed at addressing the social dimensions of the current transitions will play a crucial role in fostering resilient societies, providing evidence-based research for equitable policies, and understanding social transformations that support Sustainable Development Goals.

2.4   Partner composition and target group

The partnership will federate interested stakeholders involved in the four impact areas (Ministries of social affairs, employment, education, and climate; trade unions and other social partners; civil society organisations; social entrepreneurs etc.) and **research funding organisations**, some of whom participate in previous and existing networks.[53] . It does not replicate an existing structure, and aims to generate an **entirely new collaborative network**, bringing around the table new stakeholders, like NGOs, national, regional and local governments or trade unions and employer and industrial associations.

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[53] Including HERA, NORFACE, the CHANSE ERA-NET, JPI More Years, Better Lives and the Trans-Atlantic Platform for Social Sciences and Humanities (T-AP).

At the core of the partnership's **consortium** are (i) national research funding agencies and/or national ministries in charge of higher education and research and (ii) national ministries in charge of policymaking in the four impact areas of the partnership. Both types of partners will be responsible for the definition of calls and priorities of the partnership. Depending on the countries, and on the level of decentralization of policymaking, partners can also include regional ministries and independent public agencies. The ministries in charge of labour, social affairs, education and the climate are involved in the four impact areas and are thus necessary members of the partnership. In addition, independent public agencies, for example in charge of social protection, green transition, skills development and jobs often have a significant role in policymaking and could be involved as partners.

A **stakeholder mapping**, including a survey, carried out by the ZOE Institute for Future-fit-Economies in the preparatory phase of the partnership identifies 258 organizations in 26 countries with an interest in the development of the STR partnership. This mapping serves as a basis for the identification of the target stakeholders of the partnership and the larger ecosystem of EU-level and national organisations, active in the four impact areas of the partnership.

Beyond researchers participating in the joint calls and activities of the partnership – who are the core stakeholders in their capacity as recipients of funds – a first inner circle of **stakeholders** is formed of social partners, citizen's organisations and NGOs. Representatives of workers, educators, social workers and employers grouped in trade unions, teachers' associations, associations of social workers and employer and industrial associations could be consulted for the definition of the calls and priorities of the partnership. They should be targeted at different geographical levels: at the European level through European employer and workers' associations and European research foundations of trade unions and employer unions, and at the national level as national trade unions and employer associations. As the partnership touches upon fundamental aspects of peoples' lives (work, social protection, education, green transition), citizens groups, interest groups and NGOs should be important actors in the partnership. Groups representing and advocating for **disadvantaged groups**, local NGOs working on the improvement of local work and living conditions and on climate change, citizens groups representing special constituencies, have a voice that needs to be heard in the decision-making process of the partnership.

A particular effort should also be made to involve actors at the **subnational level,** both local governments, local trade unions and employers' associations and local NGOs and citizen groups, in as much as policies involving work, labour markets, education and skills, social protection and green transitions are decided at local levels. Centralization varies greatly across European countries, so the involvement of local policy-makers should differ across countries, reflecting the level of government at which decisions are made. In addition, EU agencies (e.g. Eurofound, ELA, ETF, CEDEFOP) and international organisations which deal with issues related to the four impact areas, such as ILO, WHO, UNESCO and the OECD, need to be included as stakeholders, as they can provide important inputs and resources to the partnership.

Private and public **foundations** with particular focus on social sciences and humanities should also be approached as major stakeholders of the partnership. They can include foundations with

specific objectives of improvement of living and working conditions and of inclusion of disadvantaged groups in society.

Representatives of the **private sector** involved in the four impact areas of the partnership should also be included in the list of stakeholders. They involve actors in the labour markets, such as temporary agencies, health care and children care providers, insurance companies involved in social and health protection, private education and continuing education institutions. With the digital and green transitions looming large in the challenges and issues forming the core of the partnership, private actors in the digital and environmental technology sectors should also be listed as major stakeholders. Moreover, the vibrant ecosystem of social innovators, entrepreneurs and impact startups who design answers on societal challenge through innovation and new business models shall be included.
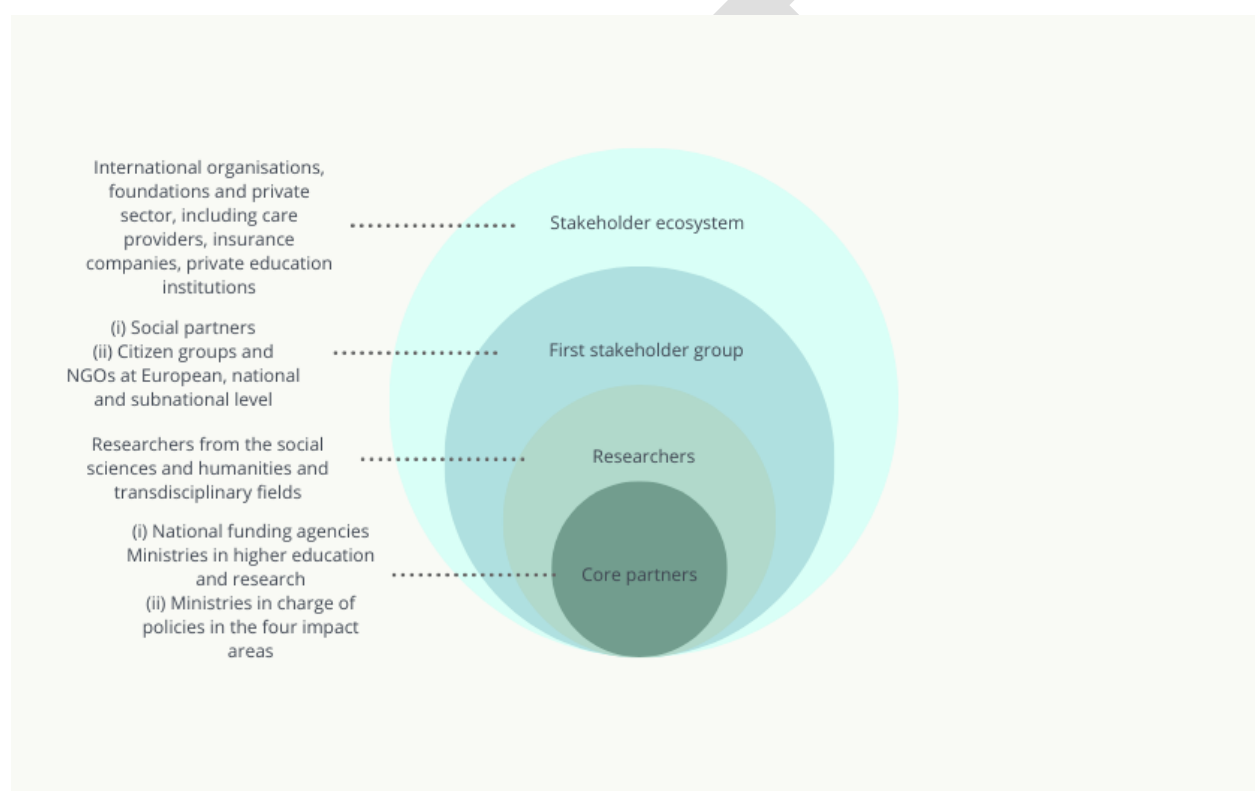

Figure 2: Partner composition and target groups

3 Planned Implementation

3.1 Activities

3.1.1 Portfolio of activities: operational objectives

In order to achieve its objective as set out in the Common Vision (see chapter 2.2.1), STR will – in accordance with its SRIA – co-creatively develop a long-term **research programme**, publish joint calls inviting research proposals (according to a schedule still to be determined), implement these calls and monitor and evaluate them. The calls to be planned will go beyond traditional collaborative project funding. In order to achieve impact not only on scientific but

on social and policy levels also and facilitate transformative impact, a **portfolio of funding instruments** will be developed. Here, STR can build on a vast array of practices and experiments regional and national partners can bring to the table and devise new and innovative funding instruments on a transnational level. Flexibility in design and use of instruments will be a key aspect in planning the calls and adapting call design to a range of objectives such as capacity building for young researchers, inclusion of civil society or civil administration, co-creative dialogue with policy and other stakeholders, experimentation on social level, use of data infrastructures, etc.

In addition to the focus on research and innovation, which will be mainly delivered by the research community, the Partnership will conduct activities going beyond call funding in order to leverage the outcomes of the calls - new knowledge, new networks, new tools, new solutions – and contribute to new effective and fair strategies and policies in tackling the twin transitions and demographic challenges. Amongst the **additional activities** of the Partnership, which will be mainly enacted by the members of the STR consortium itself are: networking and capacity building amongst consortium partners, joint strategic planning, strategic exchange with other Partnerships, coordinating parallel structures on national/regional levels, better integrating the widening countries, reaching out to international partners, and, of course, activities in knowledge exchange, knowledge valorisation, in communication and dissemination. STR will create an open space for stakeholders invested in the theme of the STR Partnership: a **participatory hub** for getting different types of stakeholders in touch and for exchanging and sharing knowledge and knowledge needs. And this space we conceive as open to communities beyond those participating in the STR Partnership.

STR will cluster and implement its operational objectives along six dimensions whose interplay will strengthen and reinforce each other in order to reach maximum impacts. Some of these activities will be implemented via calls for proposals, and some will be part of the "additional activities" of the consortium:

1. *Collect **data and evidence** to measure social transformations, drawing from a variety of qualitative and quantitative methods in the social sciences and humanities, and use these to inform the development of evidence-based public policies and strategies.*

Activities under this operational objective will be encouraged through joint calls that leverage existing survey and administrative data collected by government ministries to study the effect of the green, digital, and demographic transitions on the four impact areas. To ensure data accessibility and relevance, the calls should emphasise the need to actively engage government stakeholders and verify the quality and uniformity of available data. Activities should also consider scientific support to existing data collection and monitoring systems in public administrations and, if possible, the comparability between them at supra-national level. Calls for proposals will encourage the development of innovative data collection methods, such as psychological experiments (e.g. in workplace environments), surveys, interviews, focus groups, ethnographic observation, and citizen-generated data. Calls should highlight the need to use and integrate existing research infrastructures (e.g. European Social Survey, SHARE, CLARIN, CESSDA, Eurostat). Where appropriate, and where it would not create duplication with existing EU initiatives, proposals can also create data repositories.

2. *Promote **comparative studies** to identify and share best practices and failures at regional, national and EU level.*

Comparative studies are key to understanding complex social transformations – and the diversity of public policies that address them – across Europe, enabling the identification of

best practices and their factors of success or reasons for failure. To promote these studies, the partnership should emphasize the importance of cross-national analysis in its annual joint calls. Furthermore, the partnership should prioritise research consortia that bring together a wide range of institutions from multiple EU/Associated countries, considering different geographical contexts.

3. *Construct new, innovative ways to* **connect researchers with policymakers, stakeholders, citizens and social innovators** *in co-creating, working together, communicating needs and results.*

Activities under this operational objective will be carried out primarily as additional activities by the partners and engage with stakeholders, as well as projects funded under joint calls. They include, among others, the creation of an interactive, online platform to connect researchers, stakeholders, policymakers and citizens, gather knowledge and disseminate research results, communicate research needs for future calls, and co-create innovative solutions in the four impact areas. Citizen Science projects will be able to connect to this platform and provide accessible data for evidence-based decision making. The platform should facilitate a better integration of evidence-based knowledge into decision-making processes. To foster regular engagement on this platform, the Partnership will make use of communication experts in its consortium. Other additional activities include the organisation of conferences, stakeholder fora and networking events to foster synergies with other Partnerships, Horizon projects, and relevant initiatives at local, national and EU level (see 3.3. Governance on the **participatory hub** and the **synergies forum**). Particular attention shall be given to promote interdisciplinary and transdisciplinary collaboration between the social sciences and humanities, and across SSH research and STEM fields.

4. *Develop social and individual* **experimentations** *at all levels (subnational, national, European) to better understand the impact of social transformations and public policies.*

Joint calls to be launched under this Partnership will encourage social and individual policy and programme experimentation across the four impact areas. This includes psychological and economic approaches, as well as living labs and testing, where innovation is co-created with the involvement of relevant end-users (e.g. social insurance agencies, civil society organisations, trade unions and social partners, ministries) in real-life settings. The Partnership will explore different funding instruments for the deployment and scaling-up of possible innovative solutions, resulting from these experimentations. Focussing on transdisciplinarity for these experimentations will be essential as well as the inclusion of Citizen Science practices, combining scientific excellence with societal engagement.[54] In addition, joint calls will allow for the possibility of conducting randomised control trials (RCTs). The Partnership will promote synergies with social innovation projects under the European Social Fund (ESF+).

5. *Encourage the development of new* **analytical, methodological and epistemological tools** *to better understand social transformations and resilience.*

Linked to the overarching objective on "finding innovative solutions to social problems arising from the green, digital and demographic transition", joint activities under this operational

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[54] ECSA Working Group on Policy, Strategies and Partnerships & European Citizen Science (2024). Position Paper: Advocating for deeper integration and dedicated support for citizen science in the 10th Framework Programme for Research and Innovation

objective will focus developing new tools and methods for analysing the impact of social transformations in each of the four impact areas. Such methods can include strategic foresight analysis, action research, as well as new theoretical and empirical models, which can serve to challenge traditional ways of understanding social dynamics and resilience, for instance by integrating perspectives from marginalised communities. This objective may be reached both through calls and additional activities.

6. *Build **capacity** among the R&I community and policymakers to adjust and strengthen social infrastructures and services in light of unexpected shocks.*

With social infrastructures we understand the structures, systems and services that increase social wellbeing, foster social cohesion, and strengthen societal resilience. They include, among others, educational institutions, employment services, care facilities, such as hospitals, day care and elderly homes, civic institutions, such as courts and governments, and cultural centres. Activities under this operational objective could include workshop and training programmes, including scenario planning workshops which simulate unexpected crises (e.g. pandemics, economic and security crises). In addition, training sessions may focus on sharing evidence-based knowledge and mutual learning on crisis management, adaptive policymaking, and systemic thinking. Moreover, the Partnership will establish capacity building networks among experts in the four impact areas to provide continuous support and advice to policymakers and stakeholders to respond to social transformations.

3.1.2   Complementarities and risks of duplication

Considering that there is no other European Partnership, EIT-KIC, or Mission which focuses primarily on the social sciences and humanities to address challenges related to the European Pillar of Social Rights and the major social transformations outlined above, the risk for duplication of research activities in this field is low.

Nevertheless, the STR Partnership will engage in continuous dialogue with Commission services, notably the Directorate-Generals for Employment, Social Affairs and Inclusion (DG EMPL), for Research and Innovation (DG RTD) and for Education, Arts and Culture (DG EAC), to ensure complementarities with regular research and innovation actions funded under **Horizon Europe Cluster 2 'Culture, Creativity, and Inclusive Societies'**, as well as other Clusters. This concerns, in particular, research for the remaining two years of Horizon Europe 2026 – 2027, where projects are expected to run for three to four years, and the Partnership is expected to launch its own Work Programme in 2027. The continuous dialogue between STR partners and the Commission will be ensured through the Partnership's governance model, where Commission representatives will advise the General Assembly on strategic research priorities and policy needs. The dialogue should result in a fruitful coordination of efforts, with a definition of common objectives and themes and a clear division of labour between topics proposed in the Cluster 2 work programme and calls of the STR partnership. This cooperation is expected to continue also under the next Framework Programme for Research and Innovation (FP10).

Moreover, the STR Partnership will seek complementarities with other ongoing networks and Partnerships, by fostering synergies through deliberate joint activities (see chapter 2.2.6).

During the forthcoming development of the SRIA, complementarities with other initiatives will be further reviewed and opportunities for joint activities, including calls with other Partnerships, and collaboration with relevant EU agencies (e.g. Eurofound, ELA, CEDEFOP), will be investigated.

3.2   Resources

For realising the partnership's general, specific and operational objectives, partners are expected to contribute in two ways:

- **Through financial commitments to joint calls** in the four thematic and inter-thematic impact areas of this partnership. This includes the provision of national budgets for joint calls, using Financial Support to Third Parties (FSTP). The size of this contribution depends on the size of the country, the size of the related R&I community, the relevance of the call topics to the national policy context, and the number of projects partners wish to fund under a call.

- **Through in-kind contributions to the governance and additional activities** of the Partnership. This may include the participation in the General Assembly and Steering Groups of each impact area, as well as participation in other events, including conferences, capacity building, matchmaking and project meetings. It may also cover personal costs for the call coordination and management at the national level, as well the provision of advice and support to the effective governance of the Partnership, and the provision of national datasets or research infrastructures. Further contributions should aim at mobilising national and regional stakeholders (e.g. social partners, citizen groups, service providers) to strengthen dissemination and uptake of results.

The estimated total budget of the STR Partnership is 100 million – 120 million EUR, with a 30% co-funding rate from the Union contribution. Thus, the Partnership aims to collect around 70 to 84 million EUR from Member States and Associated Countries to deliver on its objectives.

3.3   Governance

The proposed governance model builds on the outcomes of the preparatory action, led by the ZOE Institute for Future-fit Economies and the EIT Climate KIC, and incorporates the key pillars of the 12 ERA-LEARN functions for partnership governance models.[55] The proposed governance should be considered a **preliminary structure** and will evolve over the next years, depending on the partners' needs, the setting-up of the consortium under the expected Grant Agreement, and the formation of different stakeholder groups. The partnership will make strong efforts to make the governance structure as simple, transparent and streamlined as possible, while also ensuring inclusiveness and collaboration with a wide range of stakeholders, where needed.

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[55] https://www.era-learn.eu/support-for-partnerships/governance-administration-legal-base/governance-structure-and-committees

A key aspect of this governance framework is the integration of possible tensions, which have been anticipated by the prospective partners in the preparatory phase, and which shape the approach to **communication, learning, culture, and collaboration.** These tensions reflect the challenges and complexities faced when managing diverse perspectives and objectives within the partnership.

For communication, the governance model focuses on ensuring transparency by building on a shared purpose, discussing and disseminating outcomes, and making meetings both engaging and content-rich. For learning and innovation, it emphasizes creating feedback loops that promote continuous learning and adapting processes over time.

In terms of culture, the structure prioritizes diversity, encouraging the inclusion of different interaction styles and marginalized groups, while placing justice and fairness at the centre of governance actions (through inclusion). For collaboration, the governance model advocates for flexible, responsive structures that can be revisited as needed. It offers diverse formats for participation and spreading responsibilities across diverse working groups to ensure tasks are manageable.

The proposed governance structure integrates key elements of **transformative governance** to address the complexities of modern challenges delt with in the STR Partnership. A core feature is the **iterative and adaptive process**, which emphasizes flexibility and the ability to evolve in response to uncertainties like climate change or political instability. Continuous reflection and learning, along with engaging new stakeholders, ensure governance remains responsive to changing contexts.

Additionally, the model adopts a **collaborative and inclusive approach**, involving a wide range of stakeholders across local, regional, and global levels, including public, private, and civil society actors. This inclusivity fosters diverse perspectives in decision-making.

Building **resilience** is another critical element, focusing on developing capacities such as absorptive, adaptive, and anticipatory abilities across institutions and societies. These capabilities allow for better preparedness and response to shocks and crises.

A **values-driven approach,** based on the Partnership's general objectives of building resilience, ensuring **fairness** and **inclusiveness**, fostering **social cohesion**, is central to the governance. These values guide policies and strategies, ensuring they contribute to a just future.

Finally, the shift toward transformative governance introduces tensions with traditional principles like efficiency, transparency, and accountability. The emphasis on collaboration, inclusion, and experimentation may require more time, occasionally conflicting with the need for quick decision-making and action.

Key elements

Key elements include (1) General Assembly, (2) Stakeholder inclusion and national alignment (3), Call management, (4) Managing and Coordination Body and a yearly Future Fitness Check.
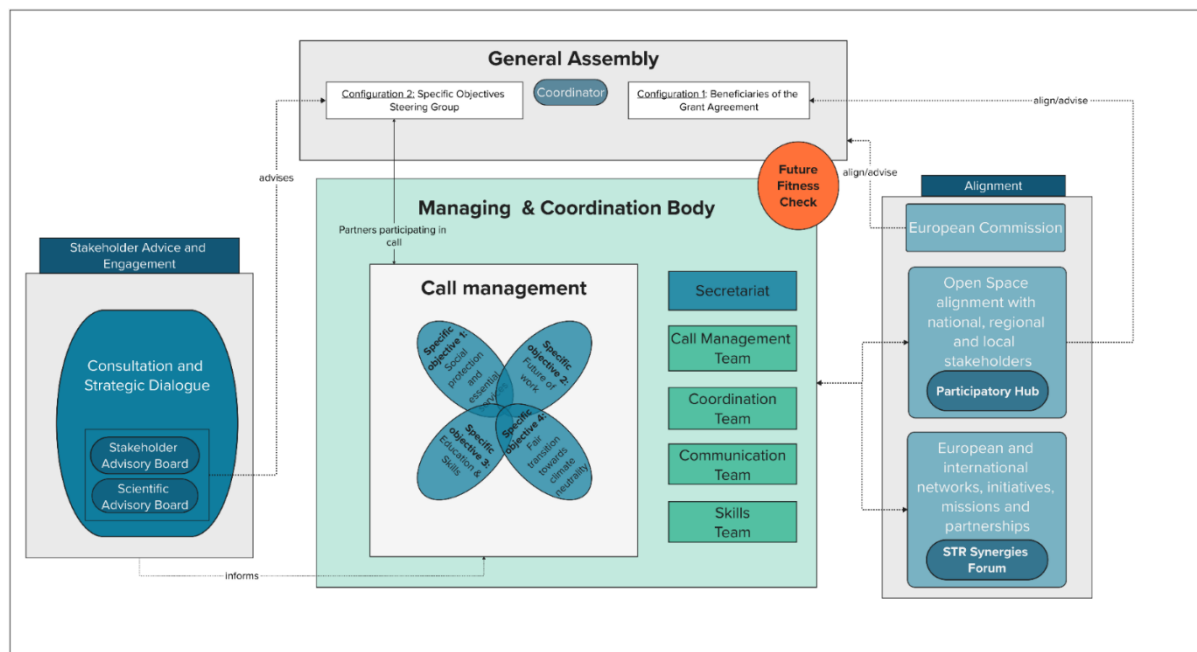

Figure 3 Preliminary governance structure

a) The General Assembly (GA)

Objective:

Manage high-level decisions on strategic matters, budget allocations, annual work plans, and membership issues, ensuring the partnership's effective operation and achievement of its objectives. It aligns with key national and European priorities and partnership goals. The inclusion of consortium members in the decision-making process ensures legitimate and transparent decisions.

Key Elements:
- Main decision body
- Meeting biyearly (spring and autumn)
- Additional regular ad-hoc meetings between Research Funding Institutions and Ministries and the European Commission.
- Led by a chair (STR-Coordinator) and two vice-chairs
- Decisions are taken by majority

The General Assembly has two configurations, each with different objectives and participants.

- **Configuration 1:** The Beneficiaries of the Grant Agreement decide on all formal matters related to the Grant Agreement (for example, if a new partner requests to join).

They make high-level decisions such as deciding on policy matters and strategic development.

- **Configuration 2:** The Steering Groups of the four specific objectives (i.e. impact areas) take all thematic decisions and participate in the elaboration the STR calls and initiatives through co-creative activities. This includes the partners which want to lead and fund calls under the four impact areas.

b) Stakeholder inclusion and alignment

Objective:
Create a space for setting and aligning work plan priorities, organising joint activities, and enhancing the uptake of results, while also fostering collaboration and information exchange with local, regional, and national stakeholders. Additionally, it aims to improve data management, transparency, and facilitate information exchange with the General Assembly.

Key Elements:
Stakeholder advice and engagement includes two dimensions:

Consultation and Strategic Dialogue: a community for knowledge sharing, learning and capacity building and involves "the ecosystem" of stakeholders such as researchers, entrepreneurs, social innovators, and practitioners, directly involved in the STR topics. Strategic Dialogues are organised two to four times a year with a plenary and specific sessions covering the four specific objectives (and its interconnections). The insights collected during those Dialogues directly inform the design of the annual STR Call.

For more targeted input to deepen the results of the Strategic Dialogues, the STR keeps the smaller stakeholder advisory board and scientific advisory board as the key advisory body identified as a key element in interviews with other partnerships.

- The **Stakeholder Advisory Board** includes representatives of Civil Society Organisations (CSOs), Social Partners, social enterprises and NGOs advocating for disadvantaged groups.
- The **Scientific Advisory Board** involves academic experts (e.g. representatives of research institutes, think tanks and universities). Each Board meets twice per year. Additionally, there is a yearly meeting with both Boards. The board is appointed by the GA and should – where possible - focus on institutions that act EU-Wide.

Alignment: The alignment with international, European and national/regional/local activities is organised around three dimensions:

- **The European Commission** for high-level advice on strategic priorities. The Commission will participate in regular meetings with the General Assembly as an observer without a vote. Instead, the Commission will review independently and validate the proposed joint call in the annual Work Programme. Alignment further

includes cooperation with the Research Executive Agency on the monitoring and implementation of the Grant Agreement.

- **A Participatory Hub:** an open space for aligning with different types of stakeholders and for exchanging and sharing knowledge and research needs and fostering uptake of results. This space is open to communities beyond those participating in the STR Partnership (to be implemented step by step, starting from projects funded under the first call).
- **Synergies Forum** with other European and international networks, partnerships and EU missions: a space for collaboration, feedback to policy, and joint initiatives, like conferences or joint calls to be implemented at a later stage (e.g. the second/third year of the Partnership). See also 2.2.6 on links and collaboration opportunities.

c) Call Management

Objective:
Ensure strong stakeholder integration around a shared goal by convening new coalitions and including diverse perspectives, particularly those of "problem owners" – individuals or representative organisations who are directly affected by the issues and possess valuable insights and knowledge.

This approach emphasizes a value-driven, collaborative, and inclusive strategy, ensuring funding flows into the right channels. It involves policymakers, researchers, and stakeholder perspectives in the activities of the Partnership.

Key elements:
Each Specific Objective is managed by a team or co-lead from Configuration 2 in the General Assembly. Managers organise meetings, draft agendas and follow up the meetings. Calls are organised around one or around the intersection of multiple Impact Areas/Specific Objectives in order to minimise silo approaches and to maximise synergies. Each call has an optional 2-level inclusion approach.

Level 1 is for partners who have a key interest in being involved in all co-creation stages of the call development. Level 2 is for partners that wish to contribute financially to a call but not be involved at every stage of co-creation.

Advisory Board Layer: Each call is supported (advice only, not management of the calls) by relevant members of the Advisory Bodies (scientific and stakeholder).

The cycle of developing and implementing additional activities, identifying call priorities, and supporting the uptake of results is based on a strong co-creational element. It includes various inputs from key stakeholders and is designed in learning and adaptative environment. From a transformative governance perspective, the cycle:
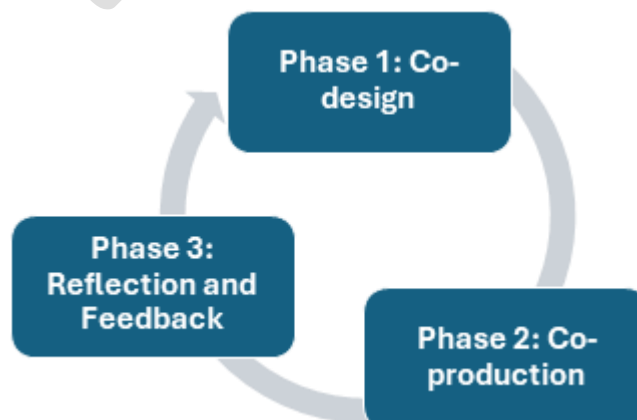
- **embeds project results of the calls** within the development of the Partnership's annual Work Programmes (iterative and adaptive process)

- **fosters experiments and prototypes** to develop new solutions (iterative and adaptive processes).
- **facilitates sharing of the results** of the calls and the governance process (transparency and inclusion)

This constantly evolving cycle of knowledge creation and implementation can be described in three phases.

Phase 1 Co-design	Phase 2 Co-production	Phase 3 Reflection and Feedback
Mapping: Involvement of funding agencies and ministries + stakeholder & scientific advisory boards, and the European Commission (Policymakers) **Establishment of a common roadmap**: Priorities and topics depend on societal challenges. **Identification of topics for joint calls & programs alignment**: Use of specific evaluation criteria (policy relevance; societal impact; stakeholder engagement, etc.).	**Survey and monitoring of funded projects:** Societal impacts assessment by the stakeholder advisory board. **Evaluation of funded project outcomes and impacts**: Assessment of both academic excellence & societal impact. **Dissemination of results and promotion of funded project impact:** Results dissemination (incl. Feedback to policy) to stakeholders and policymakers. By the project leaders themselves and by STR-P through specific materials and events (e.g., policy briefs, conferences).	**Ongoing evaluation and learning**: Continuous reflection on project outcomes, societal impacts, and the success of stakeholder engagement. **Feedback loops**: Incorporating feedback from stakeholders, advisory boards, and policymakers to refine project strategies. **Adaptation and improvement**: Using insights gained to adjust future calls, project designs, and stakeholder engagement processes, ensuring alignment with evolving societal challenges.
Cycle of knowledge creation:		

Potential risks and proposed solutions are identified in this table:

Risks	Proposed solutions
Aligning with other partnerships overburdens the governance structure	To be done gradually, starting with partnerships where there are clear thematic links and opportunities for alignment.
Keeping multiple (busy) stakeholders on board	Can be solved by good organisation, clear definition of level of engagement and expected output.
Stakeholders are overwhelmed by co-creative approach	Include capacity building elements and good structure, moderation and follow-up of events
Good balance between national position/recommendations and final decision at partnership level	Requires clarity and transparency on the decision-making process and role of the Country Specific Bodies
Alignment of agendas (national and STRP) and short deadlines for feedback (e.g. on Annual Work Plan)	Develop and communicate a transparent working flow
Different regional approaches	Can be solved by strengthening trust and understanding, e.g. with regular presentations and knowledge exchange
High turnover in roles (including Managing & Coordination Body)	Transparency and clear definition of tasks
No one is taking the lead	Explain the roles, have enough funding to support leaders
Insufficient resources	Prioritize resource allocation in initial planning stages, seek further co-funding opportunities, and adjust scope to available resources.
Not enough financial contributions	Consider contingency plans, which include diversified funding sources, aiming at clear financial commitments from additional partners.
Not enough applicants for the calls	Expand outreach efforts to underrepresented groups, engage stakeholders with targeted incentives, and regularly communicate partnership benefits and progress to attract broader participation. Support partners with communication material. Create broad calls in order to attract enough funders and researchers, and consider the use of different types of grant forms.

Figure 4: Risks and proposed solutions, based on the preparatory action by ZOE and CKIC

d) Managing and Coordination Body

Objective:

The objective of this function is ensuring effective coordination, impact monitoring, communication, and management of partnership activities. It supports reporting to the European Commission and Governing Board, calls for proposals, and collaboration across specific objectives. Additionally, it ensures compliance with European partnership rules, promotes transparency, and the partnership's workflows with capacity building. Each team is led by a partner. Additionally, where needed, external resources can be integrated, e.g. when expertise is needed for data management, communication or co-creation.

Key elements:
Call Management Team (60% of estimated Human Resources needs)
- Coordination of call management
- Impact Monitoring
- Stakeholder Engagement Support

Coordination Team (25%)
- Formal task management of the Grant Agreement
- Strategy
- Coordination of different bodies
- Data management
- Governance fire keeping and cooperation culture

Communication Team (7,5%)
- Homepage and Communication Infrastructure
- Communication of results to externals

Skills Team (7,5%)
- Moderation and co-creation support
- Skills and capacities leverage and support

e) Future Fitness Check (FFC)

The FFC is the key for adopting the governance structure to new circumstances, including external shocks and geopolitical events, but also structural changes with the next EU Framework Programme (FP10) and the transitioning into a post-EU funding phase (see 2.2.7 transition strategy). It aims at incorporating learnings and meets on a yearly basis, evaluates the past year and suggests improvements and is managed by one person, the "governance fire-keeper".

It includes one or two members from:
- Managing and Coordination Body
- Advisory Boards
- Synergies Forum
- Participatory Hub
- General Assembly
- European Commission

The FFC oversees activities at all levels, paying close attention to what is effective, what is not, and what new insights emerge through the work that require structural support. This role should be integrated into one of the meetings, such as the General Assembly (GA), to report findings, propose actions, and lead discussions and decision-making processes. The FFC establishes a structure with the understanding that various bodies within the partnership will have differing levels of activity and impact at different stages of the project. This means that a decrease in activity as the partnership progresses should not be seen as a failure, but rather as a potential dormant phase reflecting the natural cycle of engagement. The FFC may also convene in response to urgent, unforeseen events that impact the direction of the partnership, ensuring that necessary adaptations are made swiftly.

3.4   Openness and transparency

A set of actions and measures will be applied to ensure openness and transparency of the process of preparing and implementing the Partnership. The openness and transparency principle is necessary to ensure the right portfolio of partners representing different stakeholders relevant for the Partnership, as well as broad representation of partners across EU Member States and Associated Countries. These partners will participate in the process of developing Partnership's priorities and challenges that will contribute to the Partnership vision and work plan and maximise its impact. In addition, involvement of **international partners** will be explored via contacts with networks, such as Trans-Atlantic Platform for Social Sciences and Humanities (T-AP), for example.

In the period 2024 - 2026, information on development of the Partnership will be provided to Member States and Associated Countries on a regular basis, to enable them to assess potential participation in this initiative. This will be facilitated through regular communication with the Cluster 2 Programme Committee, as well as networks supporting research in Social Sciences and Humanities, such as HERA, NORFACE and CHANSE. Future beneficiaries of the Partnership will also be encouraged to engage with national actors relevant to the STR impact areas through national consultations or workshops with national stakeholder communities.

Information on the development Partnership during the preparatory phase will be shared through **CHANSE media channels**, including its website, Facebook, Twitter/X and LinkedIn accounts. In addition, support from ERA-LEARN communication channels aimed at potential interested stakeholders will be sought. Regular exchanges with the European Commission representatives overseeing the Partnership's progress will be maintained to ensure alignment with relevant European Commission policies and objectives.

To maintain regular exchange between the core group developing the Partnership, future beneficiaries and potential stakeholders on the Partnership instrument and its impact areas, workshops and information meetings will be organised.

The Partnership will strive to ensure active participation from **Widening countries**, which are less represented in the EU Framework Programmes and less active in European Partnerships.

Measures to support the involvement of these countries in the preparation and implementation of the Partnership will be applied, drawing on best practices already used by European Partnerships, as well as on guidelines and reports prepared by ERA-LEARN.

To build an inclusive programme that meets the needs of a broad range of actors and stakeholders, the Partnership will provide easy access to information about initiative, its outcomes and results. At the Partnership level, our goal will be to ensure that key outputs are widely disseminated to interested parties and presented through the Partnership communication channels. For projects funded through Partnership calls, third parties including stakeholders will be strongly encouraged to provide **open access** to research results in line with Horizon Europe provisions. Additionally, to facilitate the uptake of research finding, they will be encouraged to use appropriate dissemination measures – such as policy briefs, factsheets, videos, etc. – to engage with potential stakeholders and policymakers.

The STR Partnership will build upon a network of funders involved in the CHANSE, HERA, and NORFACE programs, each with a strong track record in creating and implementing partnerships dedicated to the SSH community in previous Framework Programmes. Continuous efforts will be made to ensure broader **geographical coverage** of partners across Europe and beyond. New partners will be approached throughout the Partnership life cycle. The recruitment strategy will also involve engaging a broad range of stakeholders relevant to the Partnership's impact areas and representing different sectors.

The STR's communication and dissemination activities will include meetings, workshops, and seminars open to all interested stakeholders. Promotion will be carried out through a dedicated website, social media, and national channels to reach a wider group of stakeholders at the national level. Potential collaboration with other networks and initiatives with similar interests and priorities will be also explored to identify common objectives, explore potential synergies, and avoid duplication of efforts.

The Partnership's **Strategic Research and Innovation Agenda (SRIA)** will be developed through an evidence-based, open, transparent, and co-creative process, involving a wide range of stakeholders. A variety of methods—such as scientific expert reports on research gaps, desk research, semi-structured interviews with relevant stakeholders, as well as dedicated workshops and focus groups—will be used to identify the Partnership's priorities and potential activities. Delphi surveys and interactive trend workshops will also be organised to provide additional opportunities for engagement. Finally, an online platform will be established to enable a broad group of stakeholders interested in the future partnership to provide feedback and further enrich the SRIA. This platform will also facilitate a sense of community building, belonging, and ownership.