



EUROPEAN
COMMISSION

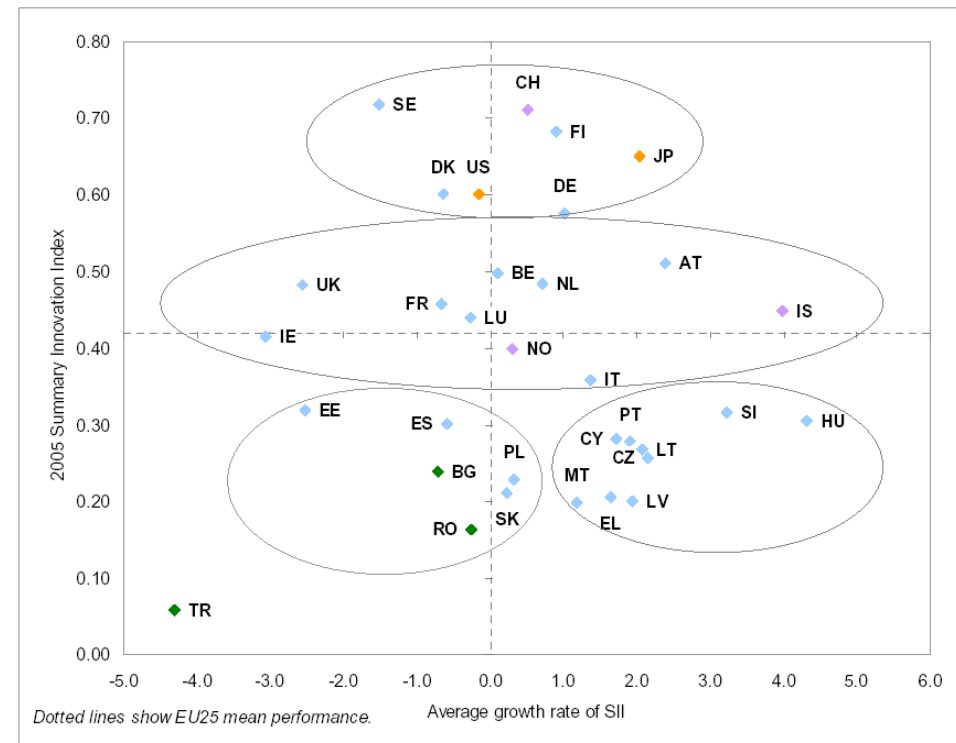
Community research

The EC Approach towards NMS, 1st Call – Lessons Learnt

2nd Call FP-7 _ Info Day _ Rzeszow

European Commission
Research DG
PODSADOWSKI, Andrzej
Unit H-3 AERONAUTICS

- Grouping of New MS
- Ways of Tapping of 'NMS potential
- NMS' Integration in ERA
- MS Challenges in light of 1st Call of FP7
- Conclusions



Notes: The circles in Figure 1 identify the four main country groupings: top = leading countries, middle = average performers, bottom right = catching up, and bottom left = losing ground.



EUROPEAN COMMISSION

Community research

New MS Expertise

People

History

Flag ships

Looking for a niche



EU Enlargement

**INTEGRATING
of NMS
POTENTIAL**





Grouping of New MS



EU 15

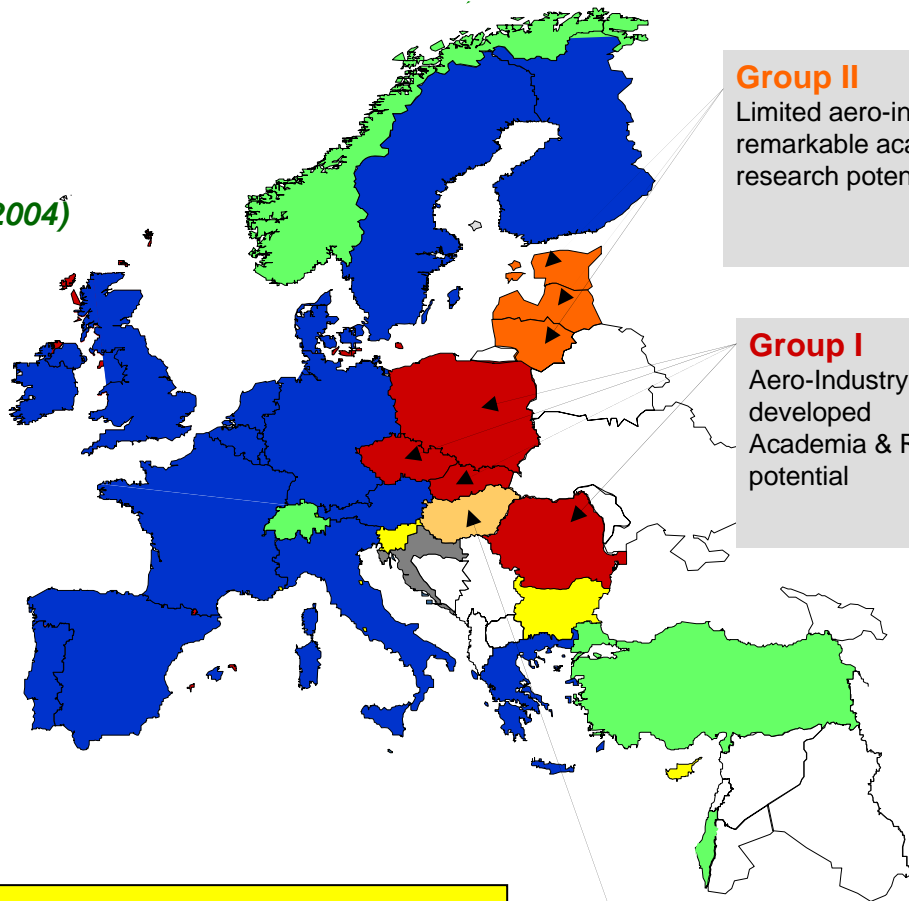


New Member States (2004)

- Cyprus
- Estonia
- Hungary
- Latvia
- Lithuania
- Malta
- Poland
- Czech Republic
- Slovenia
- Slovakia

Enlargement 2007

- Romania
- Bulgaria



Group II
 Limited aero-industry;
 remarkable academia and
 research potential

Group I
 Aero-Industry already
 developed
 Academia & Resaearch
 potential

Group IV
 Ambition to create aero-industry and participate in
 EU R&D projects

Group III
 Hungary – emerging aero-industry





Ways of Tapping of NMS Research Potential

- **Structural Funds**

- **Via the EC**

- Collaborative research

- ◆ L1/STREP, L2/IP, JTI

- ◆ CSA-SA, CSA-CA, NoE

- ERA-NET/ERA-Net PLUS

- Regions of Knowledge

- Workshops

- PC, TAG, NCP, the evaluators/reviewers/observers



- **Participation to the International Organizations**

- ACARE

- ASD, EREA, EASN



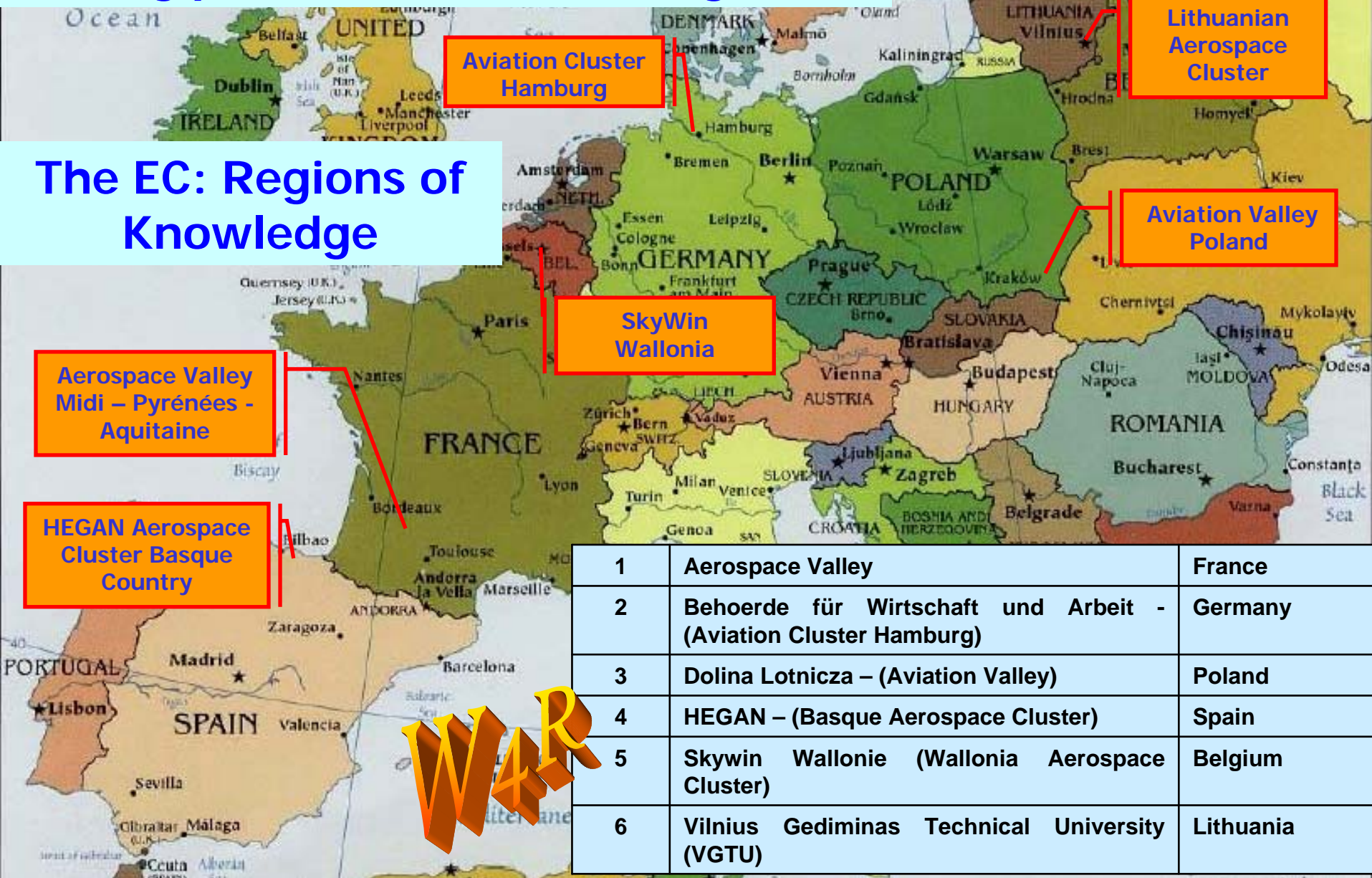
- **Bilateral relationships**



'CLUSTERING of CLUSTERS'

– a big potential for NMS integration

The EC: Regions of Knowledge



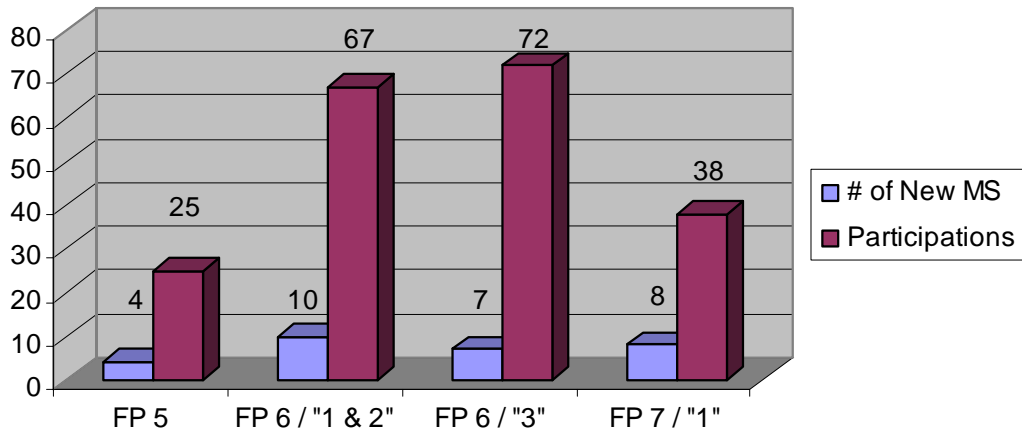
| | | |
|---|--|-----------|
| 1 | Aerospace Valley | France |
| 2 | Behörde für Wirtschaft und Arbeit - (Aviation Cluster Hamburg) | Germany |
| 3 | Dolina Lotnicza – (Aviation Valley) | Poland |
| 4 | HEGAN – (Basque Aerospace Cluster) | Spain |
| 5 | Skywin Wallonie (Wallonia Aerospace Cluster) | Belgium |
| 6 | Vilnius Gediminas Technical University (VGTU) | Lithuania |

WAR



Integration into ERA (1/2)

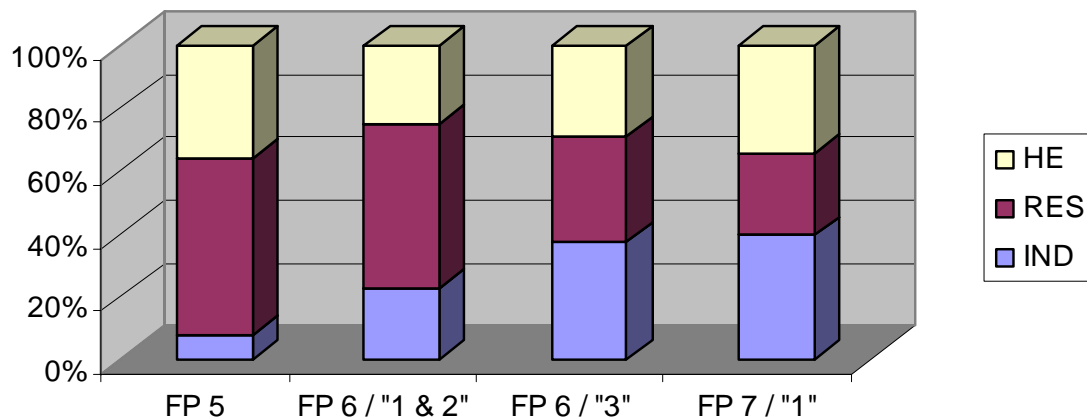
Participation in FPs - AFTER EVALUATION



The integration is progressing (metrics: number of participations)

HE & RES were 'forerunners', at present IND becomes visible

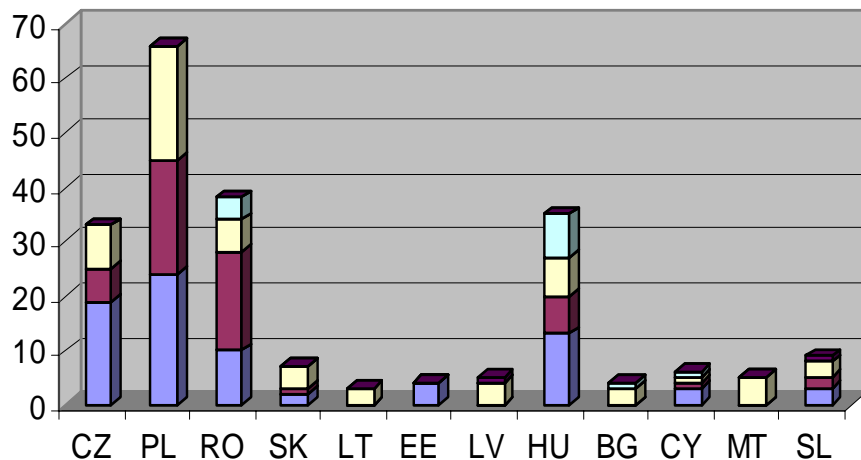
Participation in FP vs Type of Organisation AFTER EVALUATION



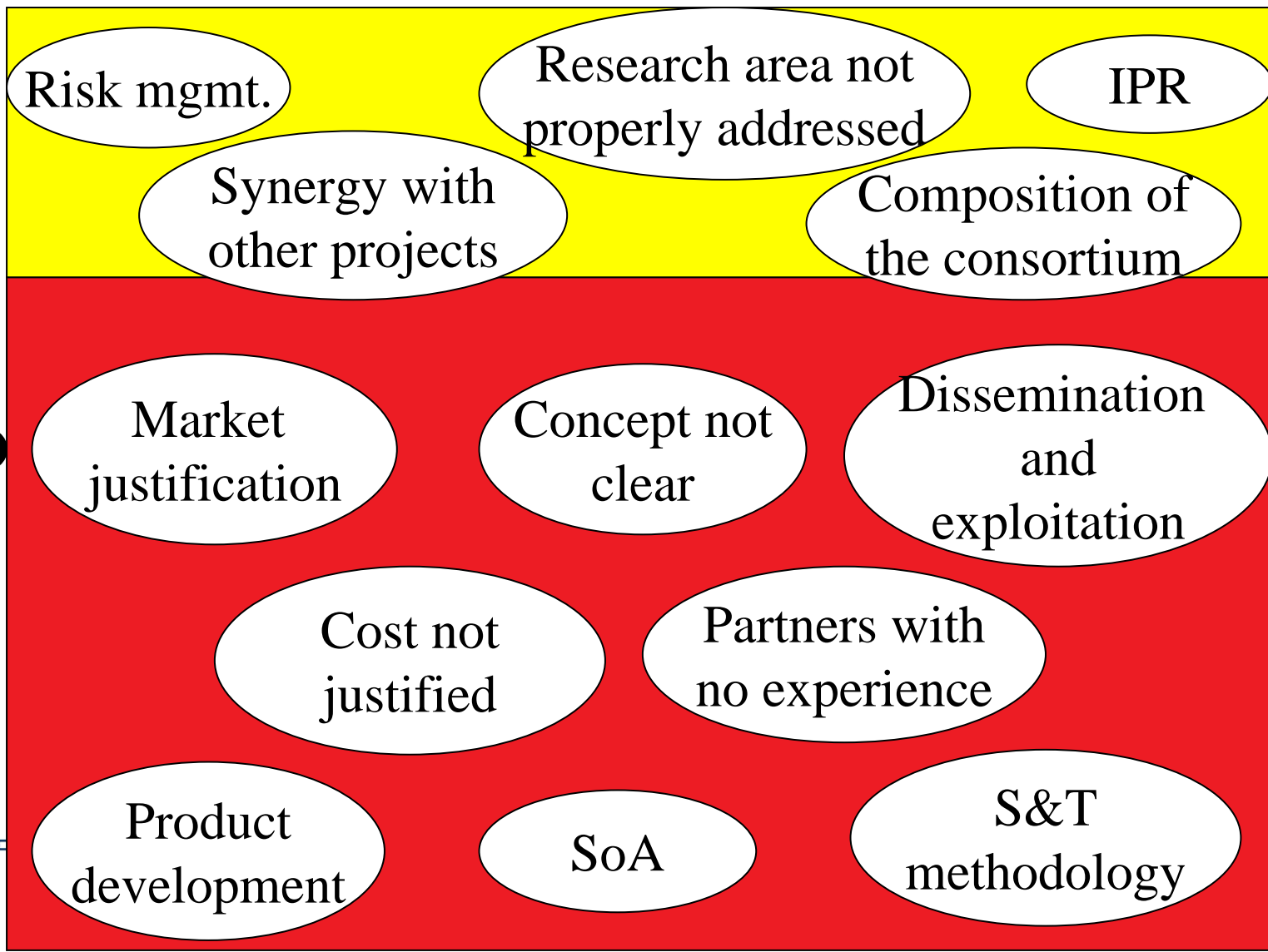
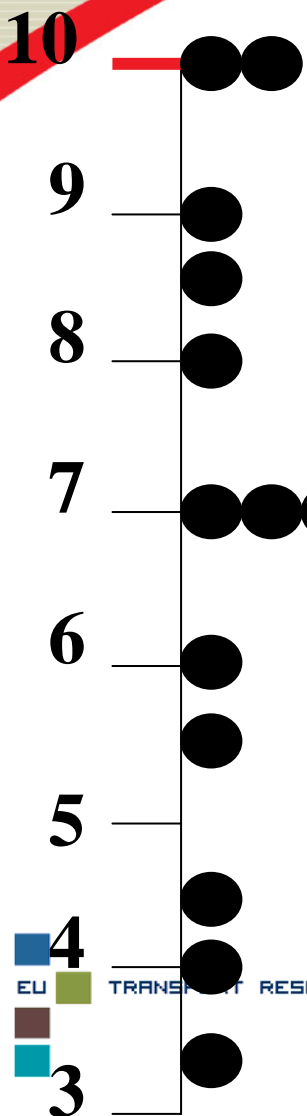


Participation by the Type of Organisation -

BEFORE Ev.



- **CZ, PL, RO, HU – involved in all research areas**
- **BG, CY, EE, LT, LV, MT, SK, SL – remain an integration challenge**





Challenges in the light of FP7-1st Call (1/2)

NMS: unsuccessful
L1 proposal coordination
0/13

| | Total | With NMS | Without NMS | % With NMS |
|---------------|-------|----------|-------------|------------|
| Level 1 | 167 | 103 | 64 | 62.0 |
| CSA-CA | 6 | 2 | 4 | 33.3 |
| Level 2 + NoE | 7 | 7 | 0 | 100.0 |
| CSA-SA | 15 | 8 | 7 | 53.3 |
| Sum | 195 | 120 | 75 | 61.9 |

- L2 – the excellent integration tool
- L1 & CSA-CA – potential area for improvements (otherwise...untapped NMS expertise/potential)

Successful participation of NMS in FP7 depends on participation to the proposals coordinated by EU-15



Challenges in the light of FP7-1st Call (2/2)

- **NMS Communication to be improved**
 - ➔ Technology research capacity (staff and infrastructure)
 - ➔ Motivation for participation
- **NMS Strategy for:**
 - ➔ Participation in EU research projects
 - ➔ National Research Agenda
 - ➔ towards International cooperation
- **Quality of NMS coordinated proposals needs to be improved (SoA, Implementation, ...)**
- **Vision 2020, SRA2 – NMS have to improve both understanding and implementation**

- **Integration of NMS in ERA is progressing**
- **NMS participation in 1st Call of FP7 reflects current (low) level of integration ("win-win")**
- **Industrial cooperation inevitable**
- **Risk of duplication of research and research infrastructure (Structural Funds!) if low advance in integration (=> Europe of 'Two speeds')**

- Aeronautics: NMS are confronted with well established industries and their R&(T)D support
- R&T potential is important but not sufficient

- **National R&(T)D Strategy to be developed**
 - Technology platform led by industry
 - Research areas/topics
- **Effective use of Structural Funds**
- **Competency niches to be worked out**
- **Legal and Financial 'tools' enabling 'in country' and international research cooperation**
- **Communication, networking, participation to international bodies and programs....**

**Governmental policies: innovativeness/research
and industrial – critical success factor**

Strengths

- Human potential
- Structural Funds
- Govt. innovativeness policies (NMS)
- Labour cost

Opportunities

- Participation to ACARE, ASD, EREA, ERA-Net 'AirTN', EASN
- Supply chain of EU leading companies
- 'EU-15' strategy towards NMS

Weaknesses

- Communication
- Networking
- Lessons learnt - 'AirTN'
- FP7 Strategy

Threats

- Competency niches not developed
- Lack of business links
- (if) not defined NMS' Govt. industrial policy



EUROPEAN
COMMISSION

Community research



Thank You for your
attention

Andrzej B. Podsadowski

+32 (0) 2 29 80 433

andrzej.podsadowski@ec.europa.eu

