



Council of the
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NOTE

From:	General Secretariat of the Council
To:	Council
Subject:	The work of the Industrial Forum <i>Information from the Commission</i>

Delegations will find attached a Commission note on the work of the Industrial Forum with a view to the meeting of the Competitiveness Council on 25 November 2021.

Industrial Forum: Progress Report and Next Steps

I. The Role of the Industrial Forum

The 2020 Industrial Strategy promised that the Commission would “work closely with an inclusive and open Industrial Forum, consisting of representatives from industry, including SMEs, big companies, social partners, researchers and well as Member States and EU institutions.”

The 2021 Industrial Strategy Update committed that “For the most relevant ecosystems and together with other relevant stakeholders, the Forum will support the development of transition pathways and the analysis of strategic dependencies. It will promote best practices and solutions across ecosystems and identify cross-border and cross-ecosystem investment needs and cooperation opportunities.”

Accordingly, the Forum has now held two meetings: in February and June 2021, with a third scheduled for 2 December. A full list of members is provided in Annex 1: it consists of a wide array of stakeholders, including industrial associations, Member States authorities, NGOs, research institutions and social partners representing different industrial ecosystems.

II. The role of the Task Forces

At the second meeting (June 2021), the Forum discussed the Industrial Strategy Update, endorsed a work plan for 2021-22¹ and supported the setting up of five dedicated task forces to carry out more detailed analysis and develop specific approaches on the different parts of the Forum’s mandate:

Task Force 1 – Economic Analysis of Ecosystems

Objective: to discuss the economic principles, the statistical methods and the data sources to monitor the implementation of the Industrial Strategy as well as to provide input to the Annual Single Market reports. The 2021 Annual Single Market Report Key Performance Indicators (KPIs) are the starting point for the discussions.

¹ See Annex III

Task Force 2 – Support the development of the transition pathways

Objective: to provide feedback on and complement the initial draft recommendations for the twin transition to green and digital in selected ecosystems; to provide input on horizontal aspects that impact several ecosystems and to facilitate dialogue with a wider range of stakeholders on the transition pathways.

Task Force 3 – Support the analysis of strategic dependencies

Objective: to discuss the results and findings presented in the Industrial Strategy Update Staff Working Document on strategic dependencies; to reflect on possible gaps in the approach and in the main tools considered to address dependencies and to feed into the work of the European Commission on the second stage in-depth review of strategic dependencies.

Task Force 4 – Identify and advice on cross-border and cross-ecosystem investment needs and cooperation opportunities

Objective: to identify areas with a potential for cross-border and cross-ecosystem collaboration, especially concerning aligning regional, national and European mission-oriented policy goals, with a view to facilitate coordination among public and private stakeholders; To facilitate coordination among key stakeholders towards potential coordinated action(s); to support the organisation of matchmaking events.

Task Force 5 - Support the uptake of advanced manufacturing processes by EU industry

Objective: to develop recommendations and work together with external stakeholders to speed up the uptake of advanced manufacturing technologies and new business models by EU industry, for increasing its competitiveness.

III. Progress so far

The work of the Task Forces started in July and is led by curators selected from Industrial Forum members and coordinated by the Commission. Member States are playing an active role in its works. Commission services, from a number of DGs, are actively supporting and contributing to the work of the Task Forces.

Both the core Forum and the Task Forces are acting in a transparent and inclusive way with external stakeholders able to follow its work and contribute to the various work streams via an interactive collaborative wiki platform².

The Commission is also ensuring that the work of the Forum and Task Forces complements and is coherent with other Commission expert groups and in particular with those developing transition pathways for individual industrial ecosystems. The aim is to harvest the results of work in priority ecosystems and promote good practice.

In particular, i) a **Horizontal Blueprint** is being developed to serve as template to deliver **transition pathways** for industrial ecosystems; ii) a **workshop on KPIs** has been organised to discuss the KPI framework developed by the Commission to monitor the implementation of the Industrial Strategy and to gather proposals for additional KPIs.

IV. Next Steps

The third meeting will take place on 2 December. It will take stock of the progress made by the Task Forces and provide important feedback to help finalise the first key deliverables. It will also discuss the approach for further deliverables such as recommendations on the KPI framework, cross-border and cross-ecosystem collaboration, strategic dependencies and advanced manufacturing. Finally, the Commission will present the concept of the EU Industry Days 2022 edition and will discuss how Forum members' can actively take part.

² <https://webgate.ec.europa.eu/fpfis/wikis/display/industrialforum>, open access with EU Login account

Looking further ahead, the Forum will be involved in the further work on **transition pathways** for industrial ecosystems. It is also expected to publish its first recommendations and reports in the area of strategic dependencies, cross-border and cross-ecosystem investment needs and cooperation opportunities and advanced manufacturing in the first and second quarters of 2022.

Members and observers of the Industrial Forum expert group

27 MS Authorities, the European Investment Bank, the European Bank for Reconstruction and Development (EBRD)

Industry, NGOs, research and technology organisations, social representatives: AeroSpace and Defence Industries Association of Europe, Artemis IA (European Technology Platform on Embedded Intelligent Systems), Business Europe, CEMBUREAU - The European Cement Association, Climate Action Network (CAN) Europe, Digital Europe, EuroChambres, EuroCommerce, EuropaBio, European Automobile Manufacturers' Association (ACEA), European Chemical Industry Council - CEFIC Aisbl, European Clusters Alliance, European Committee for Co-operation of the Machine Tool Industries (CECIMO), European Environmental Bureau (EEB), European Round Table for Industry (ERT), European Trade Union Confederation (ETUC), FIEC - European Construction Industry Federation, Industriall European Trade Union, MedTech Europe, Orgalim, SMEunited – Crafts and SMEs in Europe, The European Apparel and Textile Confederation (EURATEX), The European Confederation of Industrial and Service Cooperatives (CECOP), The Vanguard Initiative, VTT Technical Research Center of Finland Ltd, WindEurope

European Economic and Social Committee (Observer)

Curators and members of the Industrial Forum task forces

Task Force	Nominated Curator(s)	Nominated members
Task Force 1 – Economic Analysis of Ecosystems	European Round Table for Industry DIGITALEUROPE	<ul style="list-style-type: none"> • Belgium • Czechia • Portugal • France • Austria • Poland • ACEA • Aerospace and Defence Industries Association of Europe • EuropaBio • IndustriALL • Eurocommerce • ETUC • European Clusters Alliance • Orgalim • CECOP • Eurochambres • FIEC • WindEurope

Task Force 2 – support the development of transition pathways	Portugal (in the field of Tourism) European Clusters Alliance	<ul style="list-style-type: none"> • Austria • Belgium • Czechia • Finland • France • Hungary • Ireland • Malta • Poland • Sweden • Eurocommerce • IndustriAll • EEB • Eurochambres • SEE • Euratex • EuropaBio • Vanguard Initiative • CAN Europe • European Clusters Alliance • ETUC • WindEurope • SME United • DIGITALEUROPE • Orgalim • ASD • BusinessEurope • VTT • CECOP • CEMBUREAU • ACEA • European Economic and Social Committee (observer status)
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Task Force 3 - Support the analysis of strategic dependencies	France Denmark	<ul style="list-style-type: none"> • Austria • Belgium • Netherlands • Portugal • Poland • Sweden • ERT • Euratex • IndustriAll • ETUC • Eurocommerce • European Clusters Alliance • Eurochambres • Orgalim • ASD • BusinessEurope • DIGITALEUROPE • Vanguard Initiative • EuropaBio • ACEA • WindEurope
Task Force 4 - Identify and advise on cross-border and cross-ecosystem investment needs and cooperation opportunities	European Clusters Alliance DIGITALEUROPE	<ul style="list-style-type: none"> • Austria • Germany • France • Netherlands • Portugal • IndustriAll • ETUC • Orgalim • CECIMO • ASD • EURATEX • CECOP • Vanguard Initiative • EuropaBio • Eurochambres • WindEurope

Task Force 5 - Support the uptake of advanced manufacturing processes by EU industry	Orgalim CECIMO	<ul style="list-style-type: none"> • Austria • Malta • Hungary • Portugal • Ireland (tentative) • DIGITALEUROPE • Vanguard Initiative • ASD • ACEA • EuropaBio • ETUC • WindEurope • VTT • European Clusters Alliance • Eurochambres • IndustriAll
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Industrial Forum

Draft Work Plan 2021- 2022

This document presents the practical activities and outputs proposed for the Industrial Forum (see “Expected Outputs”), proposes an approach to deliver them (see “Organising Work”), and describes how the Industrial Forum will contribute to the tasks envisaged in the Industrial Strategy and its update.

It also provides a high-level description on the organisation of work and includes a provisional plan (Annex I). This document will be regularly updated and – once endorsed by the Industrial Forum – published online in the Industrial Forum’s collaborative space and the Commission's Expert Group register.

Mission

The Industrial Forum is a new, inclusive and open consultative body for the sharing of analysis and the co-design of solutions with stakeholders.

In particular, it will:

1. support the Commission in its **systematic analysis of the ecosystems and the risks and needs of industry stakeholders**;
2. support the development of **transition pathways**³;
3. support the **analysis of strategic dependencies**;
4. **identify and advise on cross-border and cross-ecosystem investment needs and cooperation opportunities**.

³ https://ec.europa.eu/info/sites/default/files/communication-industrial-strategy-update-2020_en.pdf

5. **contribute to outreach activities** on industrial policy including supporting the Commission in identifying **best practices and solutions** across ecosystems.

Expected outputs

1. Systematic analysis of the ecosystems

As part of the Industrial Strategy Update, Commission services prepared an analysis of the 14 industrial ecosystems. The analysis presents, for each ecosystem, an assessment of the relevance and contribution of the industrial policy toolkit from the perspective of the different ecosystems. The individual Ecosystem Fiches zoom into the specificities of each industrial ecosystem. The fiches are structured around the main topics: 1) Transformative initiatives; 2) Towards an EU policy toolbox fit for purpose, 3) The ecosystem at a glance, 4) Mapping policy tools in more detail. This analysis will be used as a basis for transition pathways (see next section) and will be updated periodically.

In the same context, a set of key performance indicators (KPI), based on publicly available data sources, to analyse economic developments in the EU and monitor the progress achieved. The indicators focus on competitiveness, Single Market integration, SMEs, the twin transition, and economic resilience, while also providing a forward-looking view based on investment and a confidence indicator, and an overview of the performance of the EU economy. The analysis of these indicators will help in taking a strategic stance on the EU economy, anticipate challenges, and inform policy and investment decisions.

The Industrial Forum will:

- provide feedback on the **methodology (KPIs) to monitor the implementation of the Industrial Strategy, focusing on the twin transition of industrial ecosystems transition** and
- **provide input to the Commission's annual assessment** of the implementation of the Industrial Strategy in its Annual Single Market Reports.

For more detail on the process and timing, see section “Organising work” and “Annex I – Planning” below.

2. Support the development of transition pathways

The Industrial Strategy Update calls for the co-creation of transition pathways in partnership with industry, public authorities, social partners and other stakeholders. Such pathways shall offer a better understanding of the scale, cost, long-term benefits and conditions of the required action to accompany the twin transition, leading to an actionable plan in favour of sustainable competitiveness.

Based on the initial priorities set out in the Industrial Strategy Update, the development for the transition pathways in the tourism ecosystem has already started. Preparatory work is taking place for the additional pilots in the other priority ecosystems, notably the Energy Intensive Industries, Construction, and Mobility ecosystems. The development of initial proposals for transition pathways will be led by relevant Commission services who will involve the Industrial Forum and other stakeholders in the process early on in the process.

The Industrial Forum will:

- **Develop a blueprint** to be used as concept to develop the transition pathways.
The blueprint should include the different building blocks (for example skills and competences, technology and data needs, etc.) as well as the main process stages. It will build on the experience of the pilot pathway developed for priority ecosystems;
- provide feedback on and complement the initial draft **recommendations for the twin transitions in selected ecosystems**;
- provide input on horizontal aspects that impact several ecosystems;

- facilitate dialogue with a wider range of stakeholders on the transition pathways, including promoting best practices and solutions across ecosystems throughout the process, by acting as “ambassadors“ in various events and by encouraging external stakeholder input.

For more detail on the process and timing, again see section “Organising work” and “Annex I – Planning” below.

3. Support the analysis of strategic dependencies

The Commission has undertaken an initial analysis of the EU’s strategic dependencies and capacities⁴ with a bottom-up mapping of product dependencies in sensitive ecosystems as well as in-depth reviews for a number of technological and industrial strategic areas. The Commission has reached out to Member States for comments on and validation of these initial findings.

The Industrial Forum will:

- Discuss the methodology and results as published with the update of the industrial strategy
- Reflect on possible gaps in the approach and in the main tools considered to address dependencies
- On this basis, feed into the work of the European Commission on the second stage in depth review of strategic dependencies.

Again, for more detail on the process and timing, see section “Organising work” and “Annex I – Planning” below.

⁴ See Industrial Strategy, Staff Working Document on Strategic [dependencies](#)

4. Identify and advise on cross-border and cross-ecosystem investment needs and cooperation opportunities

In parallel to the development of initial transition pathways for dedicated ecosystems, the Forum will identify areas with a potential for cross-border and cross ecosystem collaboration with a view to facilitate coordination among public and private stakeholders.

Where several countries are investing in similar projects or areas in the context of their National Recovery Plans, the Forum will offer a place for discussing possible synergies among Member States and industry supporting their implementation. The Forum will also facilitate coordination among key stakeholders towards potential coordinated action(s), where needed.

Once the opportunities for cooperation and joint/complementary public and private investment across Member States and industry are identified and cross-ecosystem innovation-driven value chains are prioritised, the Industrial Forum can support the organisation of matchmaking events to bring together interested parties to discuss the possible follow-up around common challenges.

Whilst the focus will initially be on the priority ecosystems, the lessons learned and investment opportunities are also likely to be relevant for ecosystems beyond the ones assessed.

For more detail on the process and timing, see section “Organising work” and “Annex I – Planning” below.

5. Outreach activities

To encourage dialogue with the full range of industrial and social stakeholders, and ensure full transparency, the Commission will set up an open collaborative space, which will provide up-to-date information on the work of the Industrial Forum and will allow the collaborative shaping of its draft analysis and recommendations using an online wiki tool. The website will also provide information on ongoing and planned initiatives at both EU and national level. External stakeholders will be encouraged to actively contribute to the work of the Industrial Forum by sharing relevant content such as position papers, events, or news about initiatives.

The Forum will contribute pro-actively to a gradual community building in the field. It will provide speakers for high-level events such as annual EU Industry Days and offer dedicated sessions to discuss the achieved progress of the Forum's work with stakeholders ensuring transparency, openness and inclusiveness of the process.

Organising work

The Industrial Forum should rely on the work of other high-level and expert groups wherever possible, to avoid duplications, build on their expertise and develop synergies. Commission services have started the mapping of relevant advisory stakeholder groups with a potential for closer future collaboration, which will be shared with the Industrial Forum in due time.

Task Forces

To support the above work, *ad hoc* task forces can be set up for each main deliverable within the Industrial Forum. Additional task forces may be set up in the future, if needed. Any Industrial Forum member who wishes to actively contribute to the work of task forces may volunteer to join. Each task force will have an appointed Curator (selected among the Industrial Forum members) mandated with organising and coordinating the work of the task force cooperating with relevant Commission services (across DGs) and the Secretariat, as well as reporting to the Industrial Forum. The work of the task forces will be supported by the Commission, representatives from other Commission expert groups and external stakeholders via regular online meetings and workshops.

The European Commission will provide online collaboration tools (such as an Industrial Forum wiki collaborative platform) to ensure transparency and inclusiveness of the process and involve staff from several directorate-generals to facilitate this process.

Industrial Forum Secretariat

The Industrial Forum Secretariat (managed by the DG GROW Industrial Forum, Alliances and Clusters Unit) will provide secretarial support to the work of the Industrial Forum. It will operate the Industrial Forum collaborative website and coordinate internally with relevant DG GROW units and other Commission services.

Annex I - Planning

2021

Date	Event	Expected outcome
1 February	Kick-off meeting	<ul style="list-style-type: none"> • First input to Industrial Strategy communication • Presentation of draft work plan for 2021
February-March		<ul style="list-style-type: none"> • Written input to the update of the Industrial Strategy [prior to EU Industry Days] • Nomination of Sherpas
7 May	Sherpa meeting	<ul style="list-style-type: none"> • Presentation of the ecosystem approach and discussion on the ecosystem analyses
29 June	2 nd meeting	<ul style="list-style-type: none"> • Follow-up to the Industrial Strategy update • Agreement on main deliverables and work plan for 2021 and 2022 • Presentation of best practices for transition pathways and roadmaps (Commission and Member States) • Discussion on dedicated task forces - setting up of task forces will be done via written procedure after the meeting
June-November	“work in progress”	<p>Parallel work of individual ecosystem task forces and Industrial Forum discussion (via different collaborative tools) on:</p> <ul style="list-style-type: none"> • Developing a common blueprint to be used to preparing transitional pathways based on the pilot experience of the priority ecosystems • Providing feedback on transition pathways for initial pilot ecosystems • monitoring of industrial ecosystems (methodology, KPIs) – separate workshop organised at sherpa / taskforce level • Set of workshops to gather stakeholder input for transition pathways

December 2	3 rd meeting	<ul style="list-style-type: none"> • Discussion and validation of the transition pathways blueprint (tbc) • Discussion on strategic dependencies • Discussion and selection of proposals for matchmaking events on cross-border and cross-ecosystem cooperation and investment opportunities
Additional meetings may take place if needed.		

2022

Date	Event	Expected outcome
Q1	4 th meeting	<ul style="list-style-type: none"> • Discussion on a proposed second group of priority ecosystems, based on an initial proposal by EC services • Input on reducing strategic dependencies and increasing resilience • matchmaking events on cross-border and cross-ecosystem cooperation and investment opportunities
Q1-Q3	Multiple events with stakeholders	<ul style="list-style-type: none"> • matchmaking events (e.g. at the EU Industry Days)
Q3	5 th Meeting	<ul style="list-style-type: none"> • Monitoring of transition progress of in the ecosystems • Agreement on main deliverables and work plan for 2023 and 2024
Additional meetings may take place if needed.		