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NOTE

From:	General Secretariat of the Council
To:	Delegations
Subject:	European Research Area and Innovation Committee (ERAC) plenary meeting, 12-13 June 2025, Gdansk Adoption of the ERAC Opinion on Research and Technology Infrastructures in Europe and sharing of information on the funding of Research and Technology Infrastructures

Delegations will find in annex a discussion note in view of the exchange of views and the adoption of the ERAC Opinion on Research and Technology Infrastructures in Europe (document 9513/25) at the plenary of the European Research Area and Innovation Committee (ERAC) on 12-13 June 2025 in Gdansk.

Adoption of the ERAC Opinion on Research and Technology Infrastructures in Europe and sharing of information on the funding of Research and Technology Infrastructures

Summary of the results, sharing of information and exchange of views

Discussion note

Policy context on the research and technology infrastructures ecosystem

Research and technology infrastructures provide scientific and technological capacities essential for the excellence and competitiveness of Europe's research, innovation and industrial ecosystems.

The European ecosystem of research infrastructures developed as a backbone of the European Research Area (ERA) since 2000 with the strategic contribution of the European Strategy Forum on Research Infrastructures (ESFRI), which renewed its vision in its ESFRI White Paper 2020. The activities at EU level on research infrastructures have notably included specific funding in successive Framework Programmes, including EU support to transnational access and to the development and implementation of the ESFRI roadmap, complementing the core funding from EU Member States and associated countries and other funds such as European Regional Development Fund, as well as a dedicated Council Regulation for a legal framework European Research Infrastructure Consortium (ERIC). Research Infrastructures were a priority area for joint action under Action 8 of the ERA Policy Agenda 2022-2024. The Commission has proposed for research infrastructures to be a structural policy in the ERA Policy Agenda 2025-2027, which has been strongly supported by Member States.

The attention to technology infrastructures (TIs) is more recent. The EU began working on TIs with a 2015 action plan aimed at enhancing SME access to Key Enabling Technologies (KETs). In 2019, the European Commission defined TIs and identified the main challenges facing such infrastructures in a dedicated Staff Working Document. In 2020, the new ERA elevated TIs place on the agenda, emphasising their synergy with RIs in addressing regional and industrial sectoral needs. The ERA Policy Agenda (Action 12) gave a mandate to the European Commission, together with Member States and stakeholders, to "Develop a coordination mechanism to provide industry with the technology infrastructures needed to test, validate and upscale innovations".

As part of the implementation of ERA Action 12, the Commission established an expert group on TIs, which published its report in February 2025. The report entitled “Towards a European Policy for Technology Infrastructures” included a new, more extensive proposed definition of TIs as well as recommendations on a new European governance and coordination model for TIs and improving their accessibility. The Commission has proposed the continuation of this action in the ERA Policy Agenda for 2025-2027.

Funding of research and technology infrastructures

A major objective of the actions on RIs in the ERA Policy Agenda 2025-2027 was the strengthening, consolidation and financial sustainability of Europe’s RI landscape. A report by ESFRI on the funding of RIs published in February 2025 will be presented to the ERAC, presenting recommendations for improving funding models, fostering collaboration, and enhancing financial planning across the RI ecosystem.

A study on the funding needs of Technology Infrastructures has been commissioned by the EIB Advisory Services in collaboration with the Commission. Its primary aim is to analyse past investments in TIs (last 5 years) and future investment needs (next 5 years) of main European research and technology organisations (RTOs). The study also provides the analysis of TI funding models and financing mix, as well as takes stock of good practices in TI business models and demonstrated bankability.

The study estimated that minimal funding needs for TI capital investments by 2030 will be from €13bn to €16bn, which represents a 200% projected growth rate compared to current investments. The highest capital investment needs in TIs in the coming years will be in microelectronics and clean energy, while the highest growth in investment needs compared to current levels concerns Quantum, AI & data, and Avionics & Space. On the other hand, the highest number of RTOs plan to invest in TIs for circular economy and materials, advanced materials, AI & data, advanced manufacturing.

Currently, CapEx investments in TIs rely mostly on public funding (73%, of which 89% national or regional and only 11% EU) and own resources (21%). Meeting the high investment needs in the coming years will require significant broadening of funding sources, in particular increased use of financial instruments and private funding.

Towards a European strategy for research and technology infrastructures

The recent Council Conclusions on ‘Strengthening the competitiveness of the EU, reinforcing the European Research Area (ERA) and overcoming its fragmentation’ acknowledge the significance of European Research and Technology Infrastructures as strategic assets to boost the Union’s R&I capacity. They follow Council Conclusions dedicated to research infrastructures in 2022 and political Declarations at ministerial level.

The need for a long-term, holistic strategy for research infrastructures was indicated by Member States at the ERAC meeting of 26 June 2024. The following ERAC meeting of 24 October 2024 also confirmed the need for developing a European approach to technology infrastructures and endorsed a broader, impact driven, ecosystem approach to research and technology infrastructures that will be user-need based and aim at a coherent governance framework and streamlined funding mechanisms.

In the context of these decisions, the Commission is working on a European strategy on research and technology infrastructures. A public consultation was launched on 22 April 2025 until 22 May 2025. Adoption by the Commission is foreseen in Q3 of 2025, allowing for possible pilot actions under Horizon Europe and feeding in the early discussions on FP10.

ERAC’s Opinion on the upcoming strategy

The ERAC steering board approved the preparation of an Opinion on the proposed European strategy on research and technology infrastructures, by a group of rapporteurs composed of colleagues from the FR, ES, IT and CZ ERAC delegations, supported by the Commission. The group of rapporteurs developed the Opinion based on responses to a questionnaire that was distributed to delegations on 24 February 2025, with replies permitted until 24 March. During the meeting of 14 February, the ERAC endorsed focusing the Opinion around two main questions:

- How to strengthen the ecosystem of cutting-edge facilities and services of Research Infrastructures (RIs) and Technology Infrastructures (TIs) to optimise their role for Scientific, Technological and Innovation excellence and competitiveness, including issues like accessibility, skills development, critical technologies and digitalisation?
- How to ensure a strategic governance that improves the prioritisation and pooling of investments in RIs and TIs?

In addition, during that meeting Delegations stressed the importance of fine-tuning definitions and involving the European Strategy Forum on Research Infrastructures (ESFRI) in the process. Following extensive analysis of questionnaire responses by the rapporteurs between April and early May, a draft of the Opinion was distributed to Delegations on 2 May 2025 with a deadline for written comments on 15 May.

The draft Opinion, inter alia, recommends:

- a coordinated EU-wide mapping of research and technology infrastructures, clarifying their roles across TRLs and SRLs
- an enhanced and robust system of transnational access that is tailored to their distinct missions
- increased digitalisation and data sharing
- clarification on the positioning of TIs within the wider European R&I ecosystem
- a staged approach to developing a light dedicated governance framework for TIs. This proposed body would interact with ESFRI, in order to have strategic steering for the entire research and technology infrastructure ecosystem including RIs, TIs, data and digital infrastructures at the European level.
- different funding approaches for RIs and TIs due to their specific missions, and this should also be reflected by EU funding instruments.

ERAC delegations are invited to discuss the text of the ERAC Opinion and formally adopt it during this meeting.